



# CHESAPEAKE FINANCIAL ADVISORS

## CONFIDENTIAL RISK ASSESSMENT PROFILE

How much investment risk can you accept? To give you an idea, circle the response that most closely matches your personal situation. Keep in mind that this profile is designed to offer you a general sense of your investment comfort level; there is no “foolproof” means of accurately gauging risk tolerance.

**A. I have been investing in stock or bond mutual funds (or in individual stocks and bonds) for...**

1. Less than 1 year
2. 1-2 years
3. 3-4 years
4. 5-9 years
5. 10 or more years

**B. When it comes to investing in stock or bond mutual funds (or individual stocks or bonds), I would describe myself as a/an...**

1. Very inexperienced investor
2. Somewhat inexperienced investor
3. Somewhat experienced investor
4. Experienced investor
5. Very experienced investor

**C. I am comfortable with investments that may lose money from time to time if they offer the potential for higher returns.**

1. I strongly disagree
2. I disagree
3. I somewhat agree
4. I agree
5. I strongly agree

**D. I will still keep an investment even if it loses 10% of its value over the course of a year.**

1. I strongly disagree
2. I disagree
3. I somewhat agree
4. I agree
5. I strongly agree

**E. In addition to my long-term savings program, I have an emergency savings fund equal to \_\_\_\_ months of my take-home pay.**

1. Zero
2. One
3. Two
4. Three
5. Four or more

**F. I find it easy to pay my monthly bills from my current pay.**

1. I strongly disagree
2. I disagree
3. I somewhat agree
4. I agree
5. I strongly agree

**G. Overall, my personal financial situation (that is, my job outlook and my ability to pay bills) is secure.**

1. I strongly disagree
2. I disagree
3. I somewhat agree
4. I agree
5. I strongly agree

### QUIZ SCORING

Use the number of your answer as the number of points. For instance, if you choose answer #3 to a question, that's worth three points. Note: To more accurately gauge your risk tolerance, subtract five points from your total score if you answered #1 or #2 to Question C.

Add your points and enter it here: \_\_\_\_\_.  
Now check the chart for the type of investor you are.

**If you scored between... you are considered...**

0 and 20 points	a conservative investor.
21 and 30 points	a moderate investor.
30 and 35 points	an aggressive investor.