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Risk Tolerance Questionnaire

Instructions: You can use Microsoft Word to complete this form. Just tab through the document or click with your mouse and begin typing when you see the black rectangle. To check a box, click it or press the space bar.

Name:

Date Completed:

Introduction

Many objective and subjective factors must be taken into account in an attempt to determine an individual's risk tolerance level. This questionnaire is one of the tools we utilize.

Investment Statements

Show how much you Agree or Disagree with each of the following investment statements by marking the appropriate box at the end of each sentence.

Statement		Disagree			Agree	
		1	2	3	4	5
#1	I can accept minor fluctuations in my account value in exchange for more income.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#2	I can accept a small risk of loss and somewhat larger fluctuations in my account value in exchange for conservative growth opportunity and the possibility of more income.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#3	I can accept a greater risk of loss and greater fluctuations in my account value in exchange for more aggressive growth opportunities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#4	I can accept the risk of significant losses and large fluctuations in my account value in exchange for very aggressive, rapid growth opportunities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Investment
Decisions**

Please answer both **Part 1** and **Part 2** below:

Part 1 For each of the two investment decisions below, check the option with which you are most comfortable.

Decision 1 Choose between

a. A sure gain of \$25,000

OR

b. A 25% chance of winning \$100,000 and a 75% chance of winning nothing.

Decision 2 Choose between

a. A sure loss of \$75,000

OR

b. A 75% chance of losing \$100,000 and a 25% chance of losing nothing.

Part 2 For each of the two investment decisions below, check the option with which you are most comfortable.

Decision 1 Choose between

c. A sure gain of \$250

OR

d. A 25% chance of winning \$1,000 and a 75% chance of winning nothing.

Decision 2 Choose between

c. A sure loss of \$750

OR

d. A 75% chance of losing \$1,000 and 25% chance of losing nothing.

**Investment
Input**

For current investments, what has been your annual rate of return? _____

Have you been satisfied with that return? Yes No

If no, why not? _____

What percentage of your portfolio can you afford to lose or how much money can you afford to lose in any one year? _____

What action would you take if the market dropped 50% from its present value?

Regarding your finances, what, if anything, do you spend the most time thinking about? _____

Are there things in your financial life that you wish you had done differently?

Are you pleased with

- your ability to manage and shelter your income from taxes?
-
- the diversification and performance of your portfolio?
-

What is the

- best investment decision you have ever made? _____
-

- worst investment decision you have ever made?
-

Are there any investments that you

- will NOT sell (current holdings only)? _____
 - will NOT buy (for social or other reasons)? _____
-