

## Investor Profile Questionnaire

This questionnaire is designed to help you determine which portfolio is most appropriate for you by measuring your risk tolerance, time horizon, and investment objectives. For additional guidance on which portfolio may be right for you, please speak with your Financial Advisor.

1. I expect to start withdrawing money from my account in:
  - 0 – 5 years (1 point)
  - 5 – 10 years (3 points)
  - 10 – 20 years (5 points)
  - More than 20 years (7 points)
  
2. What is your primary investment goal?
  - Avoid loss of initial investment value (1 point)
  - Stable returns on investment (3 points)
  - Obtain modest long-term growth (5 points)
  - Maximize long-term growth (7 points)
  
3. If the stock market gained 20% in any given year, I would expect a minimum return of:
  - 5 – 10% (1 point)
  - 10 – 15% (3 points)
  - 15 – 20% (5 points)
  - Equal to or greater than the return of the stock market (7 points)
  
4. Which statement describes most accurately your tolerance for risk?
  - I am not willing to accept any loss in portfolio value in order to achieve my investment goals (1 point)
  - I can accept small declines in value in order to achieve my investment goals (3 points)
  - I can accept moderate declines in value in order to achieve my investment goals (5 points)
  - I am willing to accept substantial declines in portfolio value in order to achieve my investment goals (7 points)
  
5. From September 2008 through November 2008, stocks lost over 30%. Based on my long-term investment strategy, during this time period, it would have been acceptable for me to have lost:
  - 0 to 10% (1 point)
  - 10 to 20% (3 points)
  - 20 to 30% (5 points)
  - More than 30% (7 points)

\_\_\_\_\_ **TOTAL SCORE. Please select the portfolio that corresponds with your total score on page 2.**

## MEEDER PORTFOLIOS

- 5 – 10 points: Conservative Portfolio** (30% Defensive Growth/ 70% Defensive Fixed Income)
- 11 – 15 points: Moderate Conservative Portfolio** (50% Defensive Growth/ 50% Defensive Fixed Income)
- 16 – 20 points: Balanced Portfolio** (70% Defensive Growth/ 30% Defensive Fixed Income)
- 21 – 27 points: Moderate Growth Portfolio** (100% Defensive Growth)
- 28 – 32 points: Growth Portfolio** (100% Growth)
- 33 – 35 points: Aggressive Growth Portfolio** (100% Aggressive Growth)

**Override:** If you do not agree with the results of the Investment Profile Questionnaire and would like to select a portfolio that is different from the recommended portfolio, please select a new portfolio below.

- Conservative (30% Defensive Growth/ 70% Defensive Fixed Income)
- Moderate Conservative (50% Defensive Growth/ 50% Defensive Fixed Income)
- Balanced Income (40% Growth/ 60% Defensive Fixed Income)
- Balanced (70% Defensive Growth/ 30% Defensive Fixed Income)
- Balanced Growth (60% Growth/ 40% Defensive Fixed Income)
- Moderate Growth (100% Defensive Growth)
- Growth (100% Growth)
- Aggressive Growth (100% Aggressive Growth)

This questionnaire is designed to help you begin an evaluation of your investment needs. It does not consider your specific financial or tax situation. It is not intended to be and should not be considered investment or tax advice. Please consult with your Financial Advisor before selecting a portfolio.

Client Name \_\_\_\_\_

Date \_\_\_\_\_

Client Signature \_\_\_\_\_