

Risk Tolerance Questionnaire

Please complete this short questionnaire to help me determine which type of investment could be the right investment solution for you.

* Required

1. Email address *

2. Name *

First and Last Name

3. 1. What percentage (if any) of your investment will you wish to withdraw within the next two years? *

Mark only one oval.

- 0% -25%
- 26 - 50%
- 51 - 75%
- 76% - 100%

4. 2. Would you prefer the majority of your investments allocated to Canadian or Global markets? *

Mark only one oval.

- Canadian
- Global

5. 3. What is your primary investment goal? *

Mark only one oval.

Income / Capital Preservation / Some Capital Growth

Growth

6. 4. What is your investment time horizon? *

Mark only one oval.

Less than 3 years

3 - 7 years

Greater than 7 years

7. 5. Based on your current personal and financial circumstances, are you able to withstand the risk of short-term losses? *

Mark only one oval.

No

Yes

8. 6. Are you willing to experience some extended periods of volatility as a trade-off for potential higher long-term returns? *

Mark only one oval.

No

Yes

9. 7. If your investment decreases in value due to unfavourable market conditions, how long are you willing to wait for your investment to recover? *

Mark only one oval.

- Up to one year
- 1 - 3 years
- 3 - 5 years

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