

Risk Tolerance Questionnaire

What's Your Investment Risk Comfort Zone?

Answer these quick questions to get a better sense of your personal approach to risk. There are no right or wrong answers, just insights that can help you (and us) make smarter investment decisions.

1. What would you do if your portfolio dropped 15% over a short period?

- ☐ A) Panic and sell to avoid further loss
- ☐ B) Feel concerned but wait to see what happens
- ☐ C) Stay calm, I've planned for ups and downs
- ☐ D) Buy more while prices are low

2. How long before you expect to need the money you're investing?

- ☐ A) Less than 3 years
- ☐ B) 3-5 years
- ☐ C) 5-10 years
- ☐ D) Over 10 years

3. What's more important to you right now?

- ☐ A) Avoiding losses
- ☐ B) Preserving most of my capital, with modest growth
- ☐ C) Balancing risk and return for decent long-term growth
- ☐ D) Maximising returns, even if it means bigger ups and downs

4. How would you describe your reaction to financial news?

- ☐ A) I follow it closely and get anxious during downturns
- ☐ B) I notice it but try not to overreact
- ☐ C) I tune in occasionally but trust my plan
- ☐ D) I largely ignore it, I'm focused on long-term goals

5. If you invested £100,000, what result would you be happiest with after one year?

- ☐ A) £102,000, slow and steady
- ☐ B) £105,000, knowing I could also drop to £95,000
- ☐ C) £110,000, accepting it might fall to £90,000
- ☐ D) £120,000, even if that means it could dip to £80,000