



Kechnie Benefits Group RRSP Model Portfolio Program

Investor Questionnaire

1. How soon will you need the funds you are investing?

In less than 5 years	<input type="checkbox"/> 1 point
In 5 to 10 years	<input type="checkbox"/> 2 points
In 11 to 20 years	<input type="checkbox"/> 5 points
In 21 to 30 years	<input type="checkbox"/> 10 points
In over 30 years	<input type="checkbox"/> 15 points

2. What is your gross annual income?

Less than \$25,000	<input type="checkbox"/> 1 point
\$25,001 to \$50,000	<input type="checkbox"/> 2 points
\$50,001 to \$75,000	<input type="checkbox"/> 5 points
\$75,001 to \$100,000	<input type="checkbox"/> 10 points
\$100,001+	<input type="checkbox"/> 15 points

3. What is your current financial situation?

Precarious	A lot of debt, very little savings	<input type="checkbox"/> 1 point
Somewhat Precarious	Some debt, few savings	<input type="checkbox"/> 2 points
Somewhat Stable	Some debts, some savings	<input type="checkbox"/> 5 points
Good	Few debts, some savings	<input type="checkbox"/> 10 points
Very Good	Very little debt, solid savings	<input type="checkbox"/> 15 points

4. What is your main investment goal?

Keeping my principal secure.	<input type="checkbox"/> 1 point
Maintaining a certain stability. I can tolerate yield variations with difficulty.	<input type="checkbox"/> 2 points
Seeing my investments grow. I can accept minimal return variations from time to time.	<input type="checkbox"/> 5 points
Seeing my investments grow significantly. I can accept regular variations.	<input type="checkbox"/> 10 points
Obtaining maximum long-term growth. I can accept regular & significant variations.	<input type="checkbox"/> 15 points

5. Suppose the markets go through a difficult period. What decrease in the value of your investments could you tolerate?

No decrease	<input type="checkbox"/> 1 point
Less than 5%	<input type="checkbox"/> 2 points
Between 5% to 10%	<input type="checkbox"/> 5 points
Between 10% to 20%	<input type="checkbox"/> 10 points
Over 20%	<input type="checkbox"/> 15 points

6. What minimum/maximum potential value would you choose for \$10,000 invested over a 1-year period?

	<input type="checkbox"/> 1 point	<input type="checkbox"/> 2 points	<input type="checkbox"/> 5 points	<input type="checkbox"/> 10 points	<input type="checkbox"/> 15 points
Minimum value after one year	\$9,900	\$9,500	\$9,000	\$8,500	\$8,000
Maximum value after one year	\$10,300	\$11,000	\$11,500	\$12,000	\$12,500

7. You have saved the equivalent of 10% of your gross income and it is proposed that you invest this sum in a risky stock. You have a 50/50 chance that the value of your investment will triple over the next 3 years or that you will lose the entire investment. What will you do?

I will automatically refuse the proposal.	<input type="checkbox"/> 1 point
I will carefully examine the proposal and then refuse.	<input type="checkbox"/> 2 points
I will have difficulty making a decision.	<input type="checkbox"/> 5 points
I will carefully examine the proposal and then accept.	<input type="checkbox"/> 10 points
I will automatically accept the proposal.	<input type="checkbox"/> 15 points

8. How would you rate your level of investment knowledge?

Poor	I know very little about investments.	<input type="checkbox"/> 1 point
Limited	I know the basic principles but I don't know how to apply them to my personal situation.	<input type="checkbox"/> 2 points
Moderate	I understand the basic principles and I track my investments from time to time.	<input type="checkbox"/> 5 points
Good	I know a good deal about the various investment categories and accompanying risk levels.	<input type="checkbox"/> 10 points
Very good	I have thorough knowledge of financial markets and the economy. I have extensive experience with investments and I closely track my investments and financial news.	<input type="checkbox"/> 15 points

Your Profile

Total the number of points you obtained for your answers: _____

Match your result to the appropriate Kechnie Benefits Model Portfolio.

Kechnie Benefits Model Portfolio Chosen: _____

Member Name

Member Signature

Date