



SAGEPATH FINANCIAL PLANNING, LLC

INDEPENDENT, OBJECTIVE FINANCIAL PLANNING AND ADVICE

## Risk Questionnaire

- 1. Do you generally find yourself more comfortable investing in things that have done well the last few years?**
  - Not sure/depends.
  - No.
  - Yes.
  
- 2. When you review your portfolio, do you focus more on the individual investments or the overall portfolio?**
  - I am only concerned with the overall portfolio performance.
  - While overall portfolio performance is important, I tend to focus on the performance of individual investments in the portfolio.
  
- 3. Which is closest to the largest percentage amount you ever lost on a single investment?**
  - Never lost money.
  - 25%.
  - 50%.
  - 75%.
  - 100%.
  
- 4. During 2008, stocks fell by more than 20 percent in a short period of time. If you owned an investment that suddenly fell by 20 percent, you would:**
  - Buy more.
  - Sell quickly to avoid further losses.
  - Continue to hold the investment.
  - Sell a portion of the investment.
  - Not applicable.
  
- 5. Many investors experienced steep losses in the bear market that began in the fall of 2008. Did this experience impact your willingness to accept risk?**
  - I am more concerned with risk as a result and inclined to invest more conservatively.
  - I believe bear markets create good longer-term opportunities and I am willing to invest and take on more risk at such times.
  - My willingness to take on risk is no different today than it was prior to the bear market.

**Notes/Comments:**
