

**MY/OUR INVESTMENT POLICY**  
*Print, complete, and bring to your meeting.*

**Investment Philosophy**

Attitude toward risk (Check only one)

- Conservative  
(willing to assume only limited risk)
- Average  
(willing to assume moderate level of risk)
- Aggressive  
(risk tolerance is very high)
- Overall, I rate my tolerance toward risk as  
(1-10 with 1 = risk avoider and 10 = risk taker)

	You	Spouse
Conservative (willing to assume only limited risk)	<input type="text"/>	<input type="text"/>
Average (willing to assume moderate level of risk)	<input type="text"/>	<input type="text"/>
Aggressive (risk tolerance is very high)	<input type="text"/>	<input type="text"/>
Overall, I rate my tolerance toward risk as (1-10 with 1 = risk avoider and 10 = risk taker)	<input type="text"/>	<input type="text"/>

**Investment Philosophy**

(Check only one)

- Very conservative and more interested in conserving capital than in making it grow. Willing to accept moderate income and nominal capital gains potential in exchange for relatively lower risk.
- Interested only in high-quality investments and will be quite satisfied with a reasonable current return and some growth potential. Can tolerate risk that accompanies growth potential.
- Liberal cash return with a chance for capital appreciation. Willing to accept risk of losing money on investments.
- Can accept a lower level of income now in order to aim for capital appreciation and growth of income in the future. Willing to accept a higher risk of losing money on investments.
- Willing to accept relatively high risks in exchange for possibility of above-average capital gains and appreciation.

	You	Spouse
Very conservative and more interested in conserving capital than in making it grow. Willing to accept moderate income and nominal capital gains potential in exchange for relatively lower risk.	<input type="text"/>	<input type="text"/>
Interested only in high-quality investments and will be quite satisfied with a reasonable current return and some growth potential. Can tolerate risk that accompanies growth potential.	<input type="text"/>	<input type="text"/>
Liberal cash return with a chance for capital appreciation. Willing to accept risk of losing money on investments.	<input type="text"/>	<input type="text"/>
Can accept a lower level of income now in order to aim for capital appreciation and growth of income in the future. Willing to accept a higher risk of losing money on investments.	<input type="text"/>	<input type="text"/>
Willing to accept relatively high risks in exchange for possibility of above-average capital gains and appreciation.	<input type="text"/>	<input type="text"/>