

Risk Questionnaire

Client Name:

Adviser Name:

Adviser Internal Reference:

Date:

Total Score
(from answers)

Risk Level
(from table)

Consistency Index
(from answers)

	Result	Lower	Upper
1	Very Low	18	25
2	Low	26	31
3	Low Medium	32	38
4	Low Medium	39	45
5	Medium	46	52
6	Medium	53	56
7	Medium High	57	61
8	Medium High	62	67
9	High	68	73
10	Very High	74	90

1. I would probably invest a very significant amount in a high-risk investment.

Strongly
Disagree

Disagree

Neither
Agree nor
Disagree

Agree

Strongly
Agree

1

2

3

4

5

☐
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☐

2. I would be happy putting my money into the stock market.

Strongly
Disagree

Disagree

Neither
Agree nor
Disagree

Agree

Strongly
Agree

1

2

3

4

5

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3. I would worry a great deal if I thought I would lose money in an investment.

Strongly
Disagree

Disagree

Neither
Agree nor
Disagree

Agree

Strongly
Agree

5

4

3

2

1

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4. I would consider investing in a risky investment for the excitement of seeing whether it goes up or down in value.

Strongly
Disagree

Disagree

Neither
Agree nor
Disagree

Agree

Strongly
Agree

1

2

3

4

5

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5. I would worry about losing money on the stock market.

Strongly
Disagree

Disagree

Neither
Agree nor
Disagree

Agree

Strongly
Agree

5

4

3

2

1

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☐

6. Risks are necessary to make money.

Strongly
Disagree

Disagree

Neither
Agree nor
Disagree

Agree

Strongly
Agree

1

2

3

4

5

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☐
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☐

7. The level of risk doesn't matter; it is more important to have the opportunity of achieving higher returns with my money.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
1	2	3	4	5
☐	☐	☐	☐	☐

8. I would be anxious if I saw my investments had gone down in value.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
5	4	3	2	1
☐	☐	☐	☐	☐

9. I would be happy to accept large short term falls in the value of my investments to maximise my potential longer-term returns.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
1	2	3	4	5
☐	☐	☐	☐	☐

10. I worry about the instability of the stock market.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
5	4	3	2	1
☐	☐	☐	☐	☐

11. I believe that I generally take bigger investment risks with my money than other people.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
1	2	3	4	5
☐	☐	☐	☐	☐

12. I would be happy to risk losses to get potentially greater long-term gains.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
1	2	3	4	5
☐	☐	☐	☐	☐

13. I would get a thrill from making risky investments with my money.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
1	2	3	4	5
☐	☐	☐	☐	☐

14. If there's a chance of making better long-term returns, I'm prepared to take an investment risk.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
1	2	3	4	5
☐	☐	☐	☐	☐

15. I worry about the volatility of the stock market.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
5	4	3	2	1
☐	☐	☐	☐	☐

16. I expect high investment growth and I am willing to accept the consequent possibility of large losses.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
1	2	3	4	5
☐	☐	☐	☐	☐

17. The idea that the value of my investments can be variable makes me feel anxious.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
5	4	3	2	1
☐	☐	☐	☐	☐

18. In my view, you need to take risks to make money.

Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
1	2	3	4	5
☐	☐	☐	☐	☐

Notes (Please enter any additional relevant information)