



Risk tolerance questionnaire

Many people are uncertain about the level of volatility they can or should tolerate in their investments. The information gathered here will help you and your advisor determine your risk tolerance. Your advisor can then decide if there's a conflict between the asset allocation you need and the asset allocation you can comfortably accept, given your ability to tolerate investment volatility. When answering the following questions, have your specific investment objective in mind as this will impact your time horizon and the types of securities that are appropriate for this investment.

Do you need all of your invested money back in the next year or two?

Yes **No** (if yes, please consult with your financial advisor regarding your immediate options.)

A. Personal situation

1. How many years do you expect to maintain at least your current income level?

a	5 years or less
b	5 to 10 years
c	10 years or more

2. Your financial stability is important when determining how much risk you can tolerate in your investments. Do you feel that your current financial situation is:

a	Very secure
b	Relatively secure
c	Secure
d	Somewhat secure
e	Not secure

3. Your age is:

a	Under 30
b	30 to 42
c	43 to 54
d	55 to 64
e	Over 64

B. Investment objectives and goals

4. When investing, you may choose investments that provide a regular stream of income and/or investments that offer the potential for growth. Currently you need this investment to:

a	Not decrease from your initial investment
b	Provide a stream of income
c	Provide a mix of income and growth
d	Grow, since income is not important to you at this time
e	Grow as much as possible

5. How many years will you keep this investment before you need to make withdrawals from the original amount?

a	3 years or less
b	3 to 8 years
c	8 to 12 years
d	12 years or more

C. Risk tolerance

6. When evaluating the performance of your investments, you review your holdings:

a	Frequently (at least quarterly) and sell investments that performed poorly since your last review
b	Annually and sell investments that performed poorly since your last review
c	At least annually to assess performance and change your portfolio only if investments have performed poorly for a long time and you do not expect them to recover their value
d	Infrequently or never

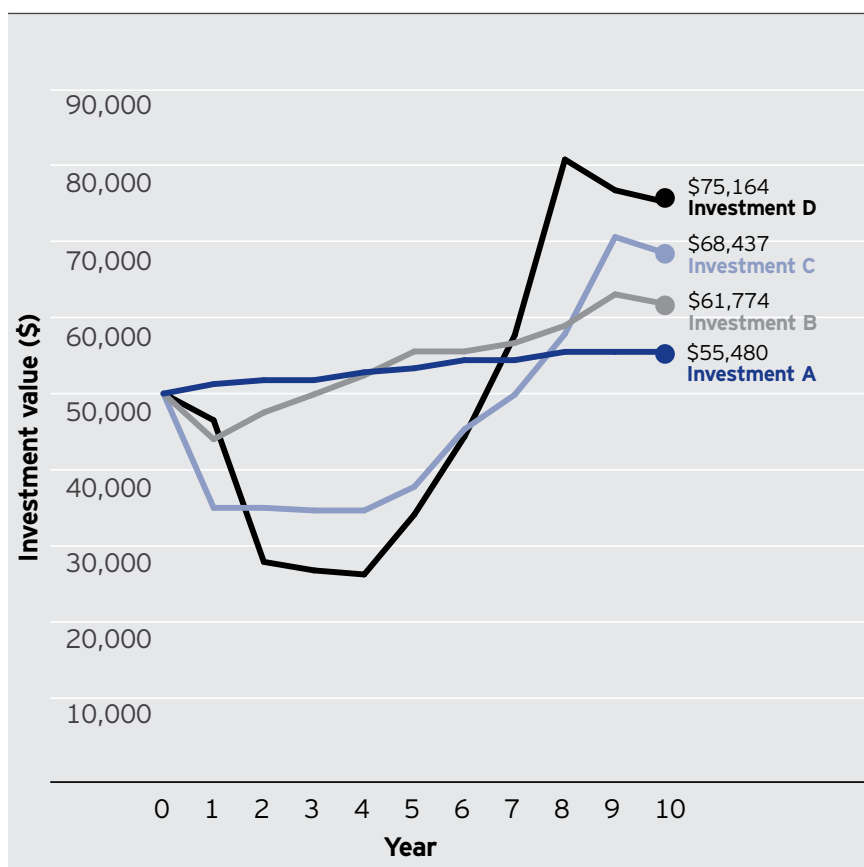
7. Which normal investment return best represents what you are prepared to accept over a one-year time frame given the potential loss that you may experience once in every 20 years?

	Normal return – Over one year	Loss – once in 20 years
a	6.2%	-6.1%
b	7.8%	-10.6%
c	9.3%	-15.7%
d	10.2%	-18.7%
e	11.0%	-21.0%

8. Last year, you purchased units in a mutual fund. Since then, it has lost 15% of its value, which is consistent with the performance of similar funds. What is your reaction?

a	I would sell my units
b	I would keep my units
c	I would buy more units

9. With an original investment of \$50,000, which hypothetical return history best represents the ideal performance for your portfolio over a 10-year period?



a	Investment A
b	Investment B
c	Investment C
d	Investment D

10. Which statement best applies to you?

a	I must achieve my financial goal by my target date
b	I would like to come close to achieving my financial goal by my target date
c	I have the flexibility to move the target date further into the future if my investment value is below my goal
d	I re-evaluate my financial goal and my target date regularly and have the flexibility to adjust either to align them with the performance of my investments

11. Which statement best describes your preferred approach to investing?

a	I would rather accept a lower rate of return to avoid fluctuations in the value of my account
b	I am willing to accept day-to-day fluctuations associated with an investment in the stock market for the potential to earn a higher return
c	I would like to achieve above-average returns on my investment and I am willing to accept some fluctuations in the value of my investment
d	I don't have a preferred approach

The answer to each question is assigned a score. Enter and total the scores onto the score sheet below.

Once you have completed the risk tolerance questionnaire, your advisor will take a moment to review and tabulate the results in order to determine your appropriate asset mix profile.

A. Personal situation					
	A	B	C	D	E
1	1	3	6	-	-
2	12	10	7	5	1
3	12	10	7	5	1
Total A					<input type="text"/>

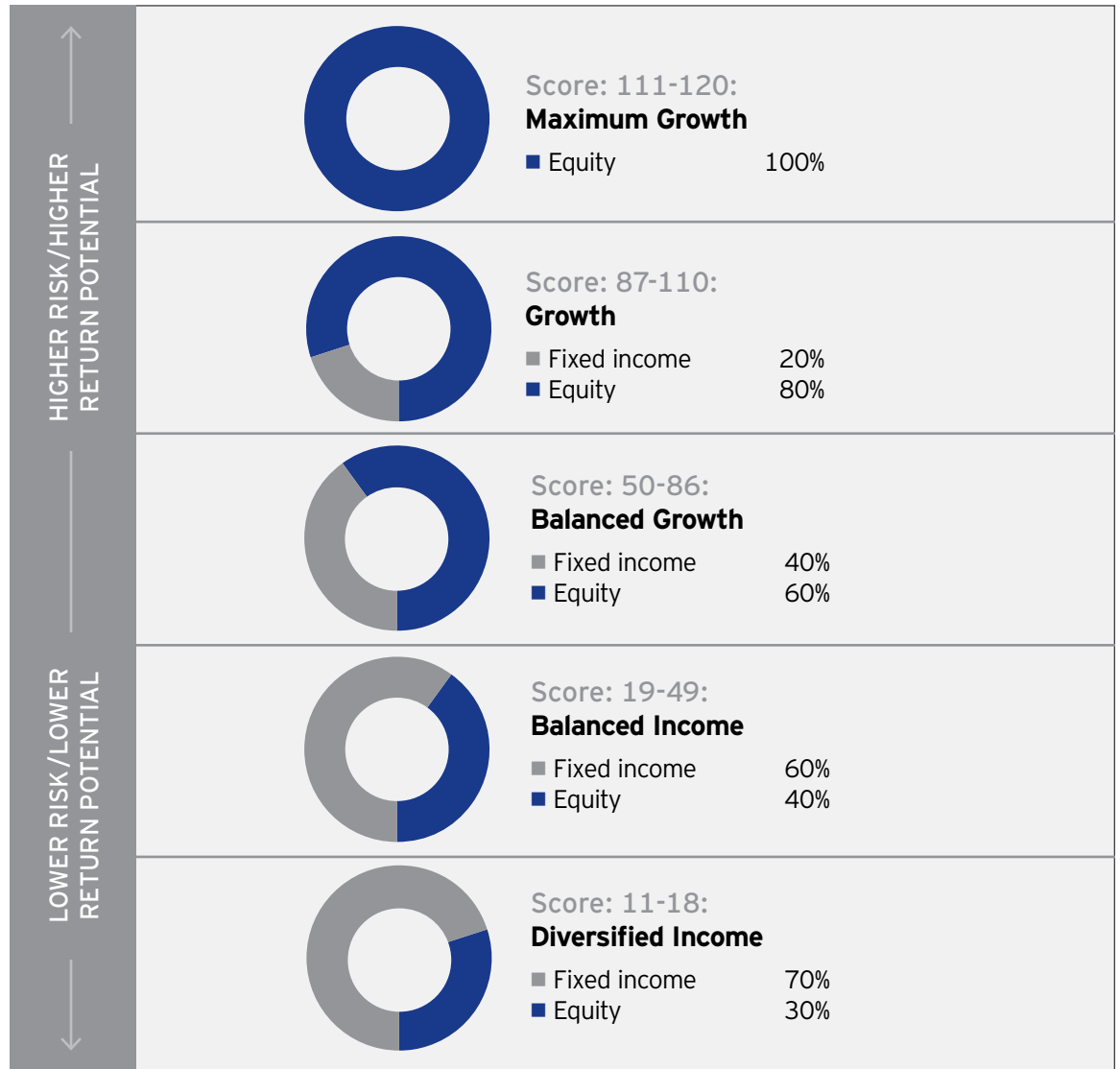
B. Investment objectives and goals					
	A	B	C	D	E
4	1	3	5	7	10
5	0	5	15	20	-
Total B					<input type="text"/>

C. Risk tolerance					
	A	B	C	D	E
6	0	1	5	0	-
7	1	5	7	10	12
8	0	5	7	-	-
9	1	5	7	10	-
10	0	5	10	13	-
11	5	7	13	0	-
Total C					<input type="text"/>

Total A + Total B + Total C



Based on your recommended profile, your advisor will work with you to select the asset mix that best meets your long-term financial goals and objectives.



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