



Instructions

ANSWER ALL QUESTIONS. This self-scoring, step-by-step worksheet will help you determine what allocation of your investment dollars may be best for your needs. There are no right or wrong answers. Select the best available answer for each question. Total the points represented in each black box and match with the corresponding suggestion strategy in the Score & Strategy section.

A. How long will you allow this investment account to grow?

- 1 2 - 3 years
- 2 4 - 5 years
- 3 6 - 7 years
- 4 8 - 9 years
- 5 10 - 12 years
- 6 13 - 15 years
- 7 more than 15 years

B. Do you expect you will need to withdraw up to half of the money in this account for any reason? (Major home repairs, college tuition, medical expenses, charitable donations, etc.)

- 1 Yes, in 1 - 2 years
- 3 Yes, in 3 - 4 years
- 4 Yes, in 5 - 6 years
- 5 Yes, in 7 - 8 years
- 6 Yes, in 9 - 10 years
- 7 No

C. Do you have an emergency fund? (Savings of at least three months' after-tax income.)

- 1 No, I do not have an emergency fund
- 3 Yes, but it is less than three months' income
- 5 Yes, but it is less than six months' income
- 7 Yes, and it is over six months' income

D. Approximately what portion of your investable assets are in your emergency account? (Investable assets include your emergency fund, this account, bank accounts, retirement accounts, CDs, mutual funds, cash value of life insurance, stocks or bonds, investment real estate, etc., but DO NOT include your residence or vacation home.)

- 1 Nearly all
- 3 Approximately 75%
- 4 Approximately 50%
- 5 Approximately 25%
- 6 Approximately 15%
- 7 Less than 15%

E. Do you expect your earnings to keep up with inflation over the next five years?

- 7 Yes, I expect them to outpace inflation. (*promotions, new jobs*)
- 5 Yes, I expect them to stay somewhat ahead of inflation
- 3 Yes
- 1 No, I expect my earnings to decrease. (*retirement, etc.*)

F. How many dependents do you have at home or that depend on you even if not living with you? (Include children you continue to support, elderly parents, but not yourself.)

- 7 None
- 5 1
- 3 2 - 3
- 1 More than 3

G. Have you ever invested in individual bonds or bond mutual funds?

- 2 No, I would be uncomfortable with the risk if I did.
- 3 No, but I would be comfortable with the risk if I did.
- 4 Yes, and I was uncomfortable with the risk.
- 5 Yes, and I felt comfortable with the risk.

H. Have you ever invested in individual stocks or stock mutual funds?

- 1 No, I would be uncomfortable with the risk if I did.
- 2 No, but I would be comfortable with the risk if I did.
- 4 Yes, and I was uncomfortable with the risk.
- 7 Yes, and I felt comfortable with the risk.

I. When thinking about your investments, where would you place yourself on the following scale?



J. Which statement describes your feelings toward choosing investment options for this account?

- 1 I am not a risk taker. (*Willing to sacrifice growth for the most safety.*)
- 3 I want low risk, but desire some growth.
- 4 I want investment growth, but allow fairly low risk.
- 5 Investment growth is a priority for me, but risk is a concern.
- 7 I am a risk taker, desiring high investment returns.

K. If I can increase my chances of increasing my returns...

- 7 I am willing to take a lot of risk with all my money.
- 5 I am willing to take a little risk with all my money.
- 3 I am willing to take a little risk with some of my money.
- 1 I am unlikely to take much risk.

L. What insurance coverage do you have?

- 2 Health insurance only.
- 1 Life insurance only.
- 2 Disability insurance only.
- 3 Health and life insurance policies.
- 4 Health and disability insurance policies.
- 3 Life and disability insurance policies.
- 5 All three policies.

M. Your Employment

- | | |
|--|---------------------------------------|
| MARRIED | SINGLE |
| <input type="radio"/> 3 One employed. | <input type="radio"/> 5 Employed. |
| <input type="radio"/> 5 Both employed. | <input type="radio"/> 1 Not Employed. |
| <input type="radio"/> 3 One retired. | <input type="radio"/> 1 Retired. |
| <input type="radio"/> 1 Both Retired. | |

N. Home payments as a percent of monthly income?

- 5 House is paid for.
- 4 House payment is less than 12% of monthly income.
- 3 House payment is between 13% and 20% of monthly income.
- 2 House payment is between 21% and 28% of monthly income.
- 1 House payment is greater than 28% of monthly income.

O. Car payments as a percent of monthly income?

- 5 Car payment is less than 3% of monthly income.
- 4 Car payment is between 4% and 5% of monthly income.
- 3 Car payment is between 6% and 7% of monthly income.
- 2 Car payment is between 8% and 9% of monthly income.
- 1 Car payment is greater than 9% of monthly income.

P. Credit card debt?

- 5 Credit cards are paid off each month.
- 1 Credit cards are not paid off each month.

Q. Monthly investable income?

- 5 I can invest over \$500 per month.
- 4 I can invest \$301—\$500 per month.
- 3 I can invest \$151—\$300 per month.
- 2 I can invest \$0—\$150 per month.

Score & Strategy

Add your points from questions A through Q and consider the appropriate strategy. The scale is an attempt to create a spectrum of the funds using a broad brush criteria of aggressiveness/risk. The scale and order of funds may not be accurate at any point in time, because as the markets shift and change, so will the relative positions of the funds. This should be considered a general guideline and not a scientifically created/maintained analytical tool. You may want to consider a more aggressive or more conservative diversification than your score indicates.

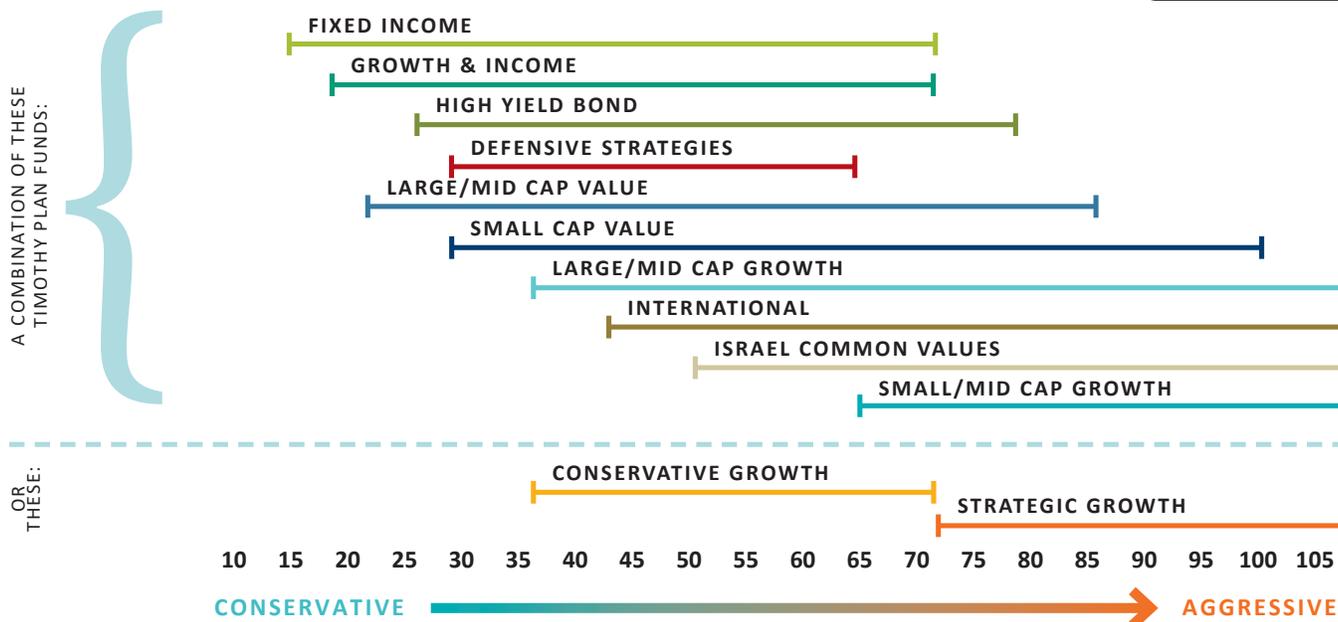
Finding the investment allocation. Find the approximate location of your score on the line graph. Move upwards, select from among the investment choices that fall within your range.

Sign and date when you considered your investments.

Signature _____

Date _____

MY SCORE



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