

Your Attitude To Risk



Blackstone Moregate
Independent Financial Advisors

How would you invest your money?
If you had £100,000 how would you invest it?

	Investment	
Risk level 1 – Conservative	%	
This means that you prefer not to invest in the stock market and are prepared to accept potentially lower returns from investments where your capital is not at risk. <i>Example Assets: Cash, Premium Bonds, National Savings</i>		
Risk level 2 – Cautious		
This means that you prefer not to invest directly in the stock market in the shorter term, but are prepared to accept a relatively low level of risk on investments over the longer term, in order to achieve potentially higher returns. <i>Example Assets: Gilts & Fixed Interest, Corporate Bond</i>		
Risk level 3 – Balanced		
This means that you are prepared to accept short-term fluctuations in the value of your investments in the hope of achieving better returns over the medium to longer term. <i>Example Assets: UK Equity, Balanced Managed, Distribution Fund, Absolute Return, Property Fund</i>		
Risk level 4 – Adventurous		
This means that you are happy to invest predominantly in equity based assets, where the risk is spread across a variety of investments (some of which are “specialist” investments) and the fund is managed on your behalf, with the aim of potentially higher returns, accepting the increased risk of a loss on your capital. <i>Example Assets: North America, Europe excluding UK, UK Smaller Companies, European Smaller Companies, Global Growth, Exchange Traded Fund (ETF)</i>		
Risk Level 5 – Highly Speculative		
This means that you are happy to invest in individual equities, with the aim of potentially higher returns, accepting the increased risk of a loss on your capital. <i>Example Assets: Global Emerging Markets, Asia Pacific excluding Japan, Equity Precious Metals, New European Emerging Markets, Shares, Swap and Derivative ETF</i>		
Do you have strong ethical concerns regarding investments?	Yes	No

Reason for Selected Risk Profile

Your Risk Questionnaire Results (if completed):

Reason for selecting the above Risk Profile:

Name:

Date:

Signature: