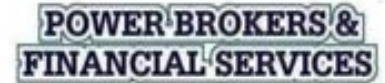


POWER RISK PROFILE

POWERING YOU TO FINANCIAL FREEDOM!



RISK PROFILE ANALYSER

1. Which of these investments would you feel more comfortable owning?
 - a. Fixed deposit
 - b. Government stock
 - c. Shares in older established companies
 - d. Blue Chip international investments
 - e. Shares in overseas emerging markets
2. Is your future financial goal
 - a. Vital, such as saving for your child's future education or saving for your retirement?
 - b. Important such as paying off your car early?
 - c. A luxury that you can do without, such as an overseas holiday?
3. What is your primary financial goal?
 - a. Capital Protection: Protection of your capital against a decline in the market value of your investments.
 - b. Capital Income: To receive an income generated from your investments.
 - c. Consistency: A high degree of stability and predictability of your investment return over time.
 - d. Long- Term Inflation Hedge: High degree of protection of long-term purchasing power of your investment.
 - e. Capital Appreciation: Increase in market value of your investments, primarily through capital growth in excess of inflation.
4. Which of the following investment returns would most appeal to you if you were to invest an initial amount of R20 000 for one year?
 - a. A guaranteed amount of R21 000.
 - b. Any amount between R20 000 to R22 000.
 - c. Any amount between R18 000 to R23 000.
 - d. Any amount between R15 000 to R26 000.
 - e. Any amount between R 0 to R 30 000.
5. Please select the statement most applicable to you:
 - a. I would rather protect my assets, even though there may be limited growth potential.
 - b. I would rather experience steady growth each year.
 - c. I would like high growth even though it may mean very volatile returns in the short term.
6. Please select the statement most applicable to you:
 - a. I believe that I will not have enough money for my goal and therefore don't want to lose what I already have.
 - b. I believe that I will have enough money for my goal and therefore would like a consistent long-term investment.
 - c. I believe that I will have more than enough money for my goal and therefore can afford to be more aggressive with the investments that I make.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Choice
7. I am prepared to accept short-term losses if I believe the long-term returns will be good.	a	b	c	d	e	
8. I would quit my job and start my own business if the right opportunity arose.	a	b	c	d	e	
9. I expect my investment earnings to increase in line with inflation over the next 5 years.	a	b	c	d	e	
10. I have sufficient funds set aside to cover most emergencies.	a	b	c	d	e	

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Scoring						
Please give yourself the following scores depending on the answers you gave and then add up your score.						
Question	a	b	c	d	e	Your Score
1	1	2	3	4	5	
2	1	2	5			
3	1	2	3	4	5	
4	1	2	3	4	5	
5	1	3	5			
6	1	3	5			
7	5	4	3	2	1	
8	5	4	3	2	1	
9	5	4	3	2	1	
10	5	4	3	2	1	
						Total score

Investment Portfolio Guide

According to your score you obtained, you will be placed in one of the categories below.

Score	Risk Profile
10 – 20	<p>Conservative Conservative investors are investors who want stability and are more concerned with protecting their current investments than increasing the real value of their investments.</p>
20 – 26	<p>Moderately Conservative Moderately conservative investors are investors who want to protect their capital, and achieve some real increase in the value of their investments.</p>
27 – 33	<p>Moderate Moderate investors are long-term investors who want reasonable but relatively stable growth. Some fluctuations are tolerable, but investors want less risk than that attribute to a fully equity based investment.</p>
34 – 39	<p>Moderately Aggressive Moderately Aggressive investors are long-term investors who want good real growth in their capital. A fair amount of risk is acceptable.</p>
40 – 50	<p>Aggressive Aggressive investors are long-term investors who want high capital growth. Substantial year-to-year fluctuations in value are acceptable in exchange for a potentially high long-term return.</p>

Date: __/__/__

Client Signature: _____

