

Financial Attitude Questionnaire

1) Rate the following methods of savings and investing:

	<u>SLIGHT PREFERENCE</u>		<u>MOST PREFERENCE</u>
savings account	1	2	3
cash value of life insurance	1	2	3
government bonds	1	2	3
corporate bonds	1	2	3
tax-exempt bonds	1	2	3
mutual funds (stock)	1	2	3
variable annuities (stock)	1	2	3
common stocks	1	2	3
real estate (personal)	1	2	3
tax shelters (oil, cattle, commercial real estate)	1	2	3

2) Would you be willing to invest in a three-year investment that

a) had a 90 percent chance of a 100 percent gain and a 10 percent chance of a 50 percent loss? Yes_____ No_____

b) had a 90 percent chance of a 50 percent gain and a 10 percent chance of a 25 percent loss? Yes_____ No_____

c) had a 90 percent chance of a 25 percent gain and a 10 percent chance of a 10 percent loss? Yes_____ No_____

3) In the handling of your finances, would you be willing to take above average risks to seek greater growth with some or all of your investable funds?

Yes_____ No_____

If yes, indicate what percent of your investable funds you would be willing to place in investments of above average risk.

_____ Percent

4) Indicate the five items you consider most important. Using **5 as most important and 1 as least important**. (Place a 5 after the most important, then 4 after the next most important, then 3,2,1.)

- a. _____ liquidity (availability)
- b. _____ current income from investments
- c. _____ future income
- d. _____ inflation protection (assuring purchasing power)
- e. _____ income tax deferral/relief
- f. _____ capital growth
- g. _____ safety of principal

Scoring the Financial Attitude Questionnaire		
		Maximum Score
Q1.	One point for each number 1 of the first five items (savings account through tax-exempt bonds), one point for each number 3 for the last 5 items (stock mutual funds through tax shelters).	10
Q2.	(a) Yes = 3 points, No = 0 points (b) Yes = 2, No = 0 (c) Yes = 1, No = 0	6
Q3	Yes = 2, No = 0 11 percent or more = 2 10 percent or below = 0.	4
Q4.	If 5 (most important) is on line C, D, E, F = 3 points; 0 for A, B, G	3
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