Attitude to Risk Profiler – client(s) view

Information below should be put into the Attitude to Risk Profiler Tool, which will calculate the relevant attitude to risk profile(s).

- This risk profiler input sheet is for information only and does not constitute advice or a recommendation on behalf of Westhill Financial Services
- Your risk profile is based on the opinions of the Henley Centre for Forecasting

Client name(s)

IFA Name

WESTHILL FINANCIAL SERVICES

Need Area

Select 1 only

☐ Providing Pension ☐ Investing Capital ☐ Regular Savings ☐ All need areas

To complete your Attitude to Risk profile ***all*** questions must be answered:

1. **How would you describe your knowledge of investments?**

	Client	Partner	Joint
No understanding/knowledge	☐	☐	☐
Very little understanding/knowledge	☐	☐	☐
About as much understanding/knowledge as the next person	☐	☐	☐
A fair degree of understanding/knowledge	☐	☐	☐
A high degree of understanding/knowledge	☐	☐	☐

2. **If your investments dropped in value by 20%, how would you react?**

Sell all of the remaining investments	☐	☐	☐
Sell a proportion of the remaining investments	☐	☐	☐
Hold the investments and sell nothing	☐	☐	☐
Buy more of the same investments	☐	☐	☐

3. **What are your main savings and investment goals?**

Immediate income	☐	☐	☐
Goals in 5-7 years	☐	☐	☐
Goals in 8-10 years	☐	☐	☐
Longer term growth (over 10 years)	☐	☐	☐

4. **How would you compare yourself to others in your willingness to take financial risks?**

Much less willing to take financial risks than average	☐	☐	☐
Slightly less willing to take financial risks than average	☐	☐	☐
No more or less willing to take financial risks than average	☐	☐	☐
Slightly more willing to take financial risks than average	☐	☐	☐
Much more willing to take financial risks than average	☐	☐	☐

5. **When you make a significant financial decision how do you normally feel afterwards?**

Very concerned	☐	☐	☐
Slightly concerned	☐	☐	☐
A little uneasy	☐	☐	☐
Confident	☐	☐	☐
Very confident	☐	☐	☐

6. **On a scale of 1-6, what level of volatility are you prepared to accept?**

1: no volatility; you are not prepared to risk any fall in value	☐	☐	☐
2: low volatility; aiming for modest gains	☐	☐	☐
3: below average; aiming for steady long term gains	☐	☐	☐
4: average volatility; aiming for good long term gains	☐	☐	☐
5: above average; aiming for greater long term gains	☐	☐	☐
6: high volatility; aiming for the highest gains	☐	☐	☐

Client(s) signature(s)

Signature

Date

Signature

Date