



Kellands Risk Profiler

Attitude to Risk Questionnaire

Find out your attitude to risk to help you make the right investment decisions. Simply, download and print off this form; indicate your choice by inserting a tick in the appropriate box and add up your total score. You can then assess your risk level, by using the table at the end. The results may surprise you.

	Strongly Disagree	Disagree	Neither Disagree nor Agree	Agree	Strongly Agree
1 Compared to the average person, I would say I take more risks.	Score 1	2	3	4	5
2 I would be willing to risk a percentage of my income in order to get a good return on an investment.	Score 1	2	3	4	5
3 To achieve high returns, it is necessary to choose high-risk investments.	Score 1	2	3	4	5
4 I have been extremely cautious in my past financial investments.	Score 5	4	3	2	1
5 Even if I experienced a substantial loss on an investment, I would not be put off making risky investments.	Score 1	2	3	4	5
6 I believe that it is reckless to take financial risks.	Score 5	4	3	2	1
7 When I am faced with a financial decision I am generally more concerned about the possible losses than the probable gains.	Score 5	4	3	2	1
8 I would rather know that I was getting a guaranteed rate of return than be uncertain about my investments.	Score 5	4	3	2	1
9 Compared to the average person, I take lower financial risks.	Score 5	4	3	2	1
10 I would rather put my money in a bank account than invest in shares.	Score 5	4	3	2	1
11 I do not feel comfortable with financial uncertainty.	Score 5	4	3	2	1
12 If my investment portfolio dropped significantly in value during the first three months, it would not bother me.	Score 1	2	3	4	5

	Strongly Disagree	Disagree	Neither Disagree nor Agree	Agree	Strongly Agree
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13 I would never take a chance with any amount of money.

Score	5	4	3	2	1

14 I would accept potential losses in order to pursue long-term investment growth.

Score	1	2	3	4	5

15 I believe that the only way to make money is to take financial risks.

Score	1	2	3	4	5

16 Taking financial risks is important to me.

Score	5	4	3	2	1

17 I would be happy investing a large proportion of my income in a high-risk investment.

Score	1	2	3	4	5

18 I would feel comfortable investing in shares.

Score	5	4	3	2	1

	Not at all comfortable	Slightly comfortable	Moderately comfortable	Comfortable	Very comfortable
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19 How comfortable do you feel when you take a financial risk?

Score	5	4	3	2	1

	Risk Averse	Somewhat risk averse	Neither risk averse or a risk taker	A moderate risk taker	A risk taker
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20 Overall, how would you place yourself on the following scale?

Score	5	4	3	2	1

Total Score (from answers)		Risk Level (from table below)	
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Risk level – to ascertain your risk profile

To find out what your risk level score means eg “defensive investor” check it out at www.kelland-gloucester.com/risk-profile.asp or contact us on 01684 850088, email gloucester@kelland.co.uk
We look forward to hearing from you.

	Result	Lower	Upper
1	Very defensive investor	20	27
2	Defensive investor	28	35
3	Very cautious investor	36	43
4	Cautious investor	44	51
5	Moderately balanced investor	52	59
6	Balanced investor	60	67
7	Moderately aggressive investor	68	75
8	Aggressive investor	76	83
9	Speculative investor	84	91
10	Very speculative investor	92	100

Your name:

Date:



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