

Client Risk Attitude Survey

Dear [Client's Name],

We value your partnership and strive to better understand your financial goals and risk preferences. To assist us in tailoring our services to your needs, we kindly ask you to participate in our Client Risk Attitude Survey.

Please find the survey attached, which consists of a series of questions designed to gauge your risk tolerance and investment objectives.

Your responses will remain confidential and will only be used to enhance your personalized financial strategies.

Thank you for your time and participation. If you have any questions, please do not hesitate to reach out.

Best regards,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]