

Investment Risk Tolerance Questionnaire

Dear [Client's Name],

We appreciate your interest in understanding your investment risk tolerance. Please find below a series of questions designed to assess your comfort with investment risk. Your responses will help us tailor an investment strategy that aligns with your financial goals.

Please answer the following questions:

1. **1. What is your primary investment goal?**
 - a) Capital preservation
 - b) Income generation
 - c) Long-term growth
 - d) Speculative growth
2. **2. How would you describe your investment experience?**
 - a) None
 - b) Limited
 - c) Moderate
 - d) Extensive
3. **3. How do you feel about market fluctuations?**
 - a) Very uncomfortable
 - b) Somewhat uncomfortable
 - c) Neutral
 - d) Comfortable
4. **4. What is your investment timeframe?**
 - a) Less than 1 year
 - b) 1 - 3 years
 - c) 3 - 5 years
 - d) More than 5 years
5. **5. How much of your portfolio are you willing to risk for potential higher returns?**
 - a) None
 - b) 10%
 - c) 20% - 30%
 - d) More than 30%

Thank you for taking the time to complete this questionnaire. Your answers will help us create a personalized investment strategy that matches your risk tolerance.

Sincerely,
[Your Name]
[Your Company]
[Contact Information]