

Investor Questionnaire

This questionnaire will assess your investment risk tolerance to help determine an appropriate investment strategy.

Step 1 - Please choose the answer you associate with most:

1. How long do you plan to maintain your donor-advised fund?

- I expect to grant out the account in more than 7 years (or pass on to future generations) (5 points)
- I expect to grant out the account in 5-7 years (4 points)
- I expect to grant out the account in 3-5 years (3 points)
- I expect to grant out the account in 1-3 years (2 points)
- I expect to grant out the account in less than 1 year (1 point)

2. Indicate which of the following statements best describes your planned contributions and grants. Do you plan to:

- Contribute substantially more money than I grant (5 points)
- Contribute more money than I grant (4 points)
- Contribute about the same amount as I grant (3 points)
- Grant more money than I contribute (2 points)
- Grant substantially more money than I contribute (1 point)

3. How would describe your knowledge of investments?

- None (1 point)
- Limited (2 points)
- Good (3 points)
- Extensive (4 points)

4. Select the investments you currently own or have owned in the past (check all that apply):

- Money market funds or cash-equivalent investments (1 point)
- Bonds or bond funds (1 point)
- Stocks or stock funds (1 point)
- International securities or international funds (1 point)

5. How important is maximizing your investment return as compared to minimizing the fluctuations in your fund value?

- Very important (5 points)
- Somewhat important (3 points)
- Not important (1 points)

6. If you could increase your chances of improving your investment returns by taking more risk, you would:

- Be unlikely to take more risk (1 point)
- Be willing to take a little more risk with some of your overall portfolio (2 points)
- Be willing to take a lot more risk with some of your overall portfolio (4 points)
- Be willing to take a lot more risk with your entire portfolio (5 points)

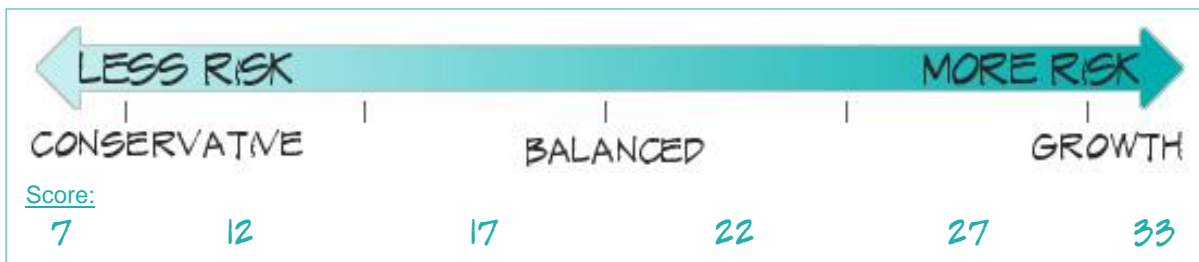
7. Currently, your main objective for this investment account is to:

- Maintain the purchasing power of your original investment (1 points)
- Accept a modest amount of return with a low amount of risk (3 points)
- Accept more risk in order to maximize the account value (5 points)

Step 2 – please add the points for each of your selections (the point totals can be found on the far right of your answers)

Total Score: _____

This score serves as a guide for your recommended investment allocation, which can be seen in the image below.



INVESTMENT STYLE RECOMMENDATIONS

27-33 points - Growth:

The Growth style carries the most risk, but has the highest potential for growth and has the longest term horizon. It invests primarily in stocks, both domestic and foreign, and has a smaller percentage of safer investments, like bonds.

22-27 points - Moderate Growth:

The Moderate Growth style carries some risk and has growth potential, but not as much as the Growth style. A slight majority of the portfolio is invested in riskier assets like stocks.

17-22 points - Balanced:

The Balanced style gets its name because it is a split between riskier and safer investments. It is less aggressive, but still has the potential for growth.

12-17 points - Moderate Conservative:

The Moderate Conservative style leans towards safer investments, but has a slight allocation to riskier assets with the potential for growth. A majority of the portfolio is in safer investments like bonds, while the riskier investments like stocks are invested in less-risky large cap and dividend paying stocks.

7-12 points - Conservative:

The Conservative theme carries the least risk with the least potential for growth and has the shortest-term horizon before gifting to charity. It invests primarily in safer investments like bonds. It maintains a slight exposure to stocks, though invests in "safer" stocks like large caps and dividend paying companies.

