

Premier Investor Profile Questionnaire Scoring key

Note: although the questions do not appear in the questionnaire with letters beside the multiple choice answers, they do appear in the same order.

Question Number	Answer and Score	Client's Score		Question Number	Answer and Score	Client's Score
1	a) 30 b) 20 c) 10 d) 0 e) 0			6	a) 0 b) 10 c) 20 d) 40	
2	a) 0 b) 10 c) 20 d) 30 e) 40			7	a) 0 b) 10 c) 20 d) 30 e) 40	
3	a) 0 b) 10 c) 20 d) 30 e) 40			8	a) 0 b) 0 c) 10 d) 30 e) 40	
4	a) 0 b) 10 c) 20 d) 30 e) 40			9	a) 0 b) 10 c) 30 d) 40	
5	a) 0 b) 0 c) 10 d) 20 e) 40			10	a) 0 b) 20 c) 30	
					Total	

If the total score is:	Investor Profile	Allocate to mix:
0 to 70	Conservative Growth	70% Fixed Income, 30% Equity
71 to 130	Moderate Growth	55% Fixed Income, 45% Equity
131 to 240	Balanced Growth	40% Fixed Income, 60% Equity
241 to 320	Aggressive Growth	25% Fixed Income, 75% Equity
321 to 380	Maximum Equity Growth	0% Fixed Income, 100% Equity