

IB Asset Management risk score questionnaire

About you

Q1. How do you rate your understanding of investing?

Little knowledge Excellent knowledge



Q2. What is your date of birth?

Q3. How would you classify your income sources and overall financial situation?

- (i) Unstable
- (ii) Somewhat stable
- (iii) Very stable

Q4. What is your estimated annual net income?

- (i) <\$40,000
- (ii) \$40,000-\$45,000
- (iii) \$45,001-\$50,000
- (iv) \$50,001-\$100,000
- (v) \$100,001-\$150,000
- (vi) \$150,001-\$250,000
- (vii) \$250,001-\$500,000
- (viii) \$500,001-\$1,000,000
- (ix) >\$1,000,000

Q5. What is your estimated liquid net worth?

- (i) <\$20,000
- (ii) \$20,000-\$50,000
- (iii) \$50,001-\$75,000
- (iv) \$75,001-\$100,000
- (v) \$100,001-\$250,000
- (vi) \$250,001-\$500,000
- (vii) \$500,001-\$1,000,000
- (viii) \$1,000,001-\$5,000,000
- (ix) >\$5,000,000

Your investment goals

Q6. What percentage of your liquid net worth will you invest through us?

- (i) Less than 20%
- (ii) 21% to 40%
- (iii) 41% to 60%
- (iv) More than 60%

Q7. When do you need to use the capital you invest through us?

- (i) No specific time
- (ii) 3 to 5 years
- (iii) 1 to 2 years
- (iv) This year

Q8. Which option best describes your attitude towards the trade-off between risk and return for this account?



Q9. If a substantial portion of your investments were securities and the stock market experienced a significant drop in value during a market decline (e.g., over 10% in a month), what would you do? (If you did experience a significant value drop in your investments, select the answer that corresponds to the actual action you took.)

- (i) Sell all remaining investments
- (ii) Sell a portion of my remaining investments
- (iii) Hold onto or buy more of the investment