

# Financial personality assessment

This assessment measures your attitudes to investment risk and how you approach financial decisions. It typically takes around 2 minutes to complete.

1. I often make financial decisions quickly and regret them later.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

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2. I would risk losses to get potentially greater long-term gains.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

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3. I expect higher investment growth and I am willing to accept a higher possibility of large losses.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

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4. My emotions influence my financial decision-making.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

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5. I would worry about my investments frequently fluctuating in value.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

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6. If there is a chance of making better long-term returns, I am prepared to take higher investment risks.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

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7. I am more prepared to take investment risks than other people.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

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8. I prefer to invest in things I know well.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

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9. I avoid investments that are unfamiliar to me.

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

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10. I am comfortable with the possibility of ending up with less than I expect, for the chance of ending up with more than I expect.

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

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11. I am well informed about investing.

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

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12. I would worry about losing money on financial markets.

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

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13. I get worried when my investments drop in value.

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

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14. I am comfortable with uncertainty when investing my money.

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

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15. I am willing to put a significant part of my wealth in high-risk investments.

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

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16. I am prepared to participate in market downturns and upswings rather than receive more consistent annual returns.

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

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17. I am an experienced investor.

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

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