

Prisma

Risk Profile Questionnaire



Prisma makes it easier to choose investments that match your needs. After completing this risk profile questionnaire, you and your Financial Advisor will be able to:

- accurately assess your attitude to investment risk;
- match investments to your personal risk profile.

Client's name:

1 What age are you?

_____ years

2 How long do you plan to invest for?

_____ years

3 How would you describe your investment knowledge and experience?

- Expert:** I am **highly experienced** with investments and have in-depth knowledge of how investments work.
- High:** I **have experience** with investing and understand the various different types of investments and their associated risks.
- Moderate:** I have **some experience** in investing and I know about the basic types of investments.
- Little:** I have **very limited experience** in investing and I have little knowledge about investments and their risks.
- None:** I have **no investment experience**.

4 What is your investment objective?

- I want to achieve the **best possible return** and I understand that this can come with the highest risk.
- I would like **high long-term growth** but with less fluctuations and I accept that this may come with lower growth potential.
- I place **equal weight on growth and capital** security.
- I aim for a **return that beats inflation** but I do not want to be exposed to large fluctuations in the value of my investment.
- My aim is to **protect the capital** I have invested.

5 How concerned would you be with a short-term (6 months) decline in the value of your investment?

- I would **not** be concerned.
- I would only be **slightly** concerned.
- I would be **moderately** concerned.
- I would be **very** concerned.
- I would be **extremely** concerned.

continued overleaf

6 What is your appetite for investment risk?

If you invested €10,000 today, what range of potential values would you consider to be an acceptable return for your investment after 5 years?

- between €6,300 and €17,200.
- between €6,800 and €16,300.
- between €7,900 and €14,000.
- between €8,900 and €12,100.
- between €9,800 and €11,600.

7 What is your approach to taking risks?

If you could increase the value of your investment by taking more risk, would you:

- Be willing to take a **LOT** more risk with **ALL** of your money.
- Be willing to take a **LITTLE** more risk with **ALL** of your money.
- Consider the potential losses and only be willing to take a **LITTLE** more risk with **SOME** of your money.
- Consider the potential losses and be **UNWILLING** to take any more risk.

Important Information

The Zurich Life Prisma Risk Profiler is an illustrative tool designed to assist you in understanding your attitude to risk, an important step before making an investment.

The Zurich Life Prisma Risk Profiler does not constitute advice from Zurich Life. It is very important that you review your overall situation and investment needs with a Financial Advisor prior to making an investment.

There are a number of important issues to consider when determining your attitude to risk and the Zurich Life Prisma tool may only include some of these. It is important that you obtain professional advice and by signing your name below, you are confirming that:

- you have not received any advice from Zurich Life; and
- that you understand that the Zurich Life Prisma Risk Profiler is an illustrative tool and is not a substitute for professional advice from your Financial Advisor.

Name: (print)

Signature:

Date:

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