

LIFE INSURANCE



## Your investor profile

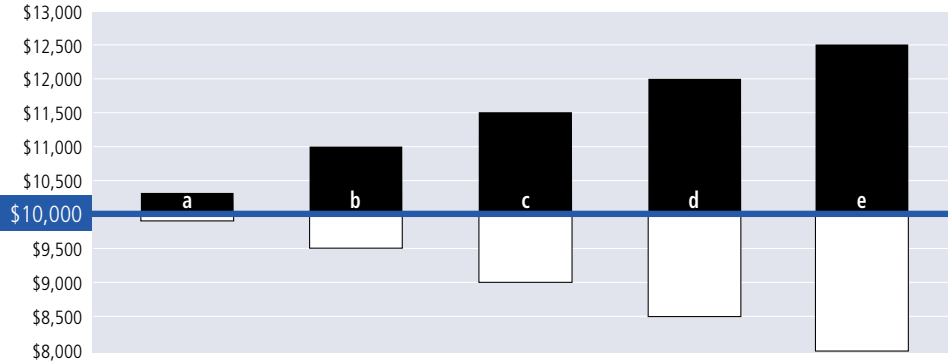
The allocation of your assets is the very heart of your financial strategy. It is important to choose the asset allocation that is best suited for you.

The first step consists in filling out the Your Investor Profile questionnaire. This document will help you to evaluate many elements, such as your investment horizon, your tolerance to risk and your knowledge about investments. Depending on your results, five major investor types emerge: Prudent, Moderate, Balanced, Growth-Oriented and Aggressive.

We recommend that you review your investor profile periodically or whenever changes take place in your personal or financial situation.

### Risk Tolerance (cont.)

7 You have the possibility of investing \$10,000 for a period of one year. After one year, what value range would you consider acceptable in terms of the investment's final potential value in comparison to its initial value?



- a) Between \$9,950 and \$10,300
- b) Between \$9,500 and \$11,000
- c) Between \$9,000 and \$11,500
- d) Between \$8,500 and \$12,000
- e) Between \$8,000 and \$12,500

### Investment Knowledge

8 What is your level of knowledge about investments?

- a) Very low I am just starting to become familiar with investments.
- b) Low My knowledge in the area of investments is limited. I know that certain investments are riskier than others.
- c) Moderate I am familiar with some types of investments and their related risks. For instance, I understand that equities are riskier than bonds.
- d) Advanced I am familiar with equities, bonds and investment funds. I understand the earnings potential and risks involved with these types of investments and their fluctuations in value over time.
- e) Very advanced I keep a constant eye on stock markets (equities, bonds, funds, real estate, etc.) and I have in-depth knowledge of such investments, which allows me to advise others in this respect.

### Points calculator

Answer  
 a = 1 point  
 b = 2 points  
 c = 5 points  
 d = 10 points  
 e = 20 points

Points for this profile

Total points  
 From 8 to 24 points = Prudent profile  
 From 25 to 54 points = Moderate profile  
 From 55 to 99 points = Balanced profile  
 From 100 to 119 points = Growth profile  
 From 120 to 140 points = Aggressive profile

### Your investor profile results

Choice of investments

Does your choice correspond to your investor profile? Yes  No

If the investments selected do not reflect those suggested by the established profile, please state the reasons why:

Client's initials

Client's signature

Agent's signature

Signed at \_\_\_\_\_, on \_\_\_\_\_

B.M. initials

## **Important**

This document is designed to guide you in the establishment of your investment strategy. Although we have taken steps to provide you with the most accurate evaluation possible, you are responsible for choosing your own investment strategy. The Company is not liable for any losses resulting from the use of this questionnaire.