



CLEARVIEW PROFILE QUESTIONNAIRE

1. How important is capital preservation?

*Not at all* *Moderately important* *Very important*

1  2  3  4  5  6  7  8  9

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2. How important is growth?

*Not at all* *Moderately important* *Very important*

1  2  3  4  5  6  7  8  9

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3. How important is low volatility?

*Not at all* *Moderately important* *Very important*

1  2  3  4  5  6  7  8  9

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4. How important is inflation protection?

*Not at all* *Moderately important* *Very important*

1  2  3  4  5  6  7  8  9

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5. How important is current cash flow?

*Not at all* *Moderately important* *Very important*

1  2  3  4  5  6  7  8  9

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6. How much risk are you willing to take to achieve a higher return?

*None at all* *A moderate amount* *A lot*

1  2  3  4  5  6  7  8  9

Client(s) Name: \_\_\_\_\_ DATE: \_\_\_\_\_

Client(s) Date of Birth: \_\_\_\_\_