

How Much Of A Risk Taker Are You?

Circle the statement that best describes your feelings about your savings and investment dollars.

It is most important to me to:

- A Have savings growing for future use and not immediately available.
- B Have my savings and investments easily convertible to cash at all times.
- *
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- C Have my savings and investment dollars pay me interest or dividends for current use.
- *
- A Have savings growing for future use and not immediately available.
- D Have all savings tax exempt or tax deferred.
- *
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- E Have savings insured and return predictable.
- *
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Count up the number of times you circled each letter.

A ___ B ___ C ___ D ___ E ___

Risk Taking Styles

- A Means you are willing to put money away for future use and growth.
- B Means you desire liquidity, that is, your savings and investments can be turned into cash without decrease of dollars invested.
- C Means you are interested in current income from your investments.
- D Means you do not want to pay taxes on your investments or you prefer to have your payments tax deferred until you are in a lower tax bracket.
- E Means you do not want to take risks with your money and you want to know exactly what interest you will earn on your money.