

LifeView® Risk Tolerance Questionnaire

This questionnaire will guide our analysis by helping us to define and understand your tolerance to risk.

NAME _____ DATE COMPLETED (MM/DD/YYYY) _____

Questions 1–4. Please rank the following Investment Objectives from Most Important (1) to Least Important (4).

- _____ Income
- _____ Aggressive Income
- _____ Capital Appreciation
- _____ Speculation

Question 5. Please choose the risk tolerance below that best describes your attitude toward investing.

- Conservative Moderate Aggressive

Question 6. Please choose the Primary Financial Need for the assets included in this analysis.

- | | |
|--|---|
| <input type="checkbox"/> Wealth Accumulation | <input type="checkbox"/> Current Income |
| <input type="checkbox"/> Retirement | <input type="checkbox"/> Health Care/Long-Term Care |
| <input type="checkbox"/> Major Purchase | <input type="checkbox"/> Estate/Legacy Planning |
| <input type="checkbox"/> Education Planning | <input type="checkbox"/> Charitable |

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Question 7. In approximately how many years do you expect to begin withdrawing funds for your Primary Financial Need?

- Immediately
- Less than 2 Years
- 2–5 Years
- 6–10 Years
- 11–20 Years
- More than 20 Years

Question 8. Once you begin to withdraw funds for your Primary Financial Need, over how long of a period do you anticipate the withdrawals to continue?

- | | |
|--|---|
| <input type="checkbox"/> Immediately | <input type="checkbox"/> 6–10 Years |
| <input type="checkbox"/> Less than 2 Years | <input type="checkbox"/> 11–20 Years |
| <input type="checkbox"/> 2–5 Years | <input type="checkbox"/> More than 20 Years |

Financial Advisor, or review our *Understanding Your Brokerage and Investment Advisory Relationships* brochure, available at <https://www.morganstanley.com/wealth-relationshipwithms/pdfs/understandingyourrelationship.pdf>.

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