

Establishing your client's 4-Dimensional Investment Profile questionnaire

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Title	<input type="text"/>
Forename	<input type="text"/>
Surname	<input type="text"/>
House name/number	<input type="text"/>
Street	<input type="text"/>
Town/city	<input type="text"/>
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Postcode	<input type="text"/>
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These responses need to be entered into the online 4D Profiler in order to generate a result.

Attitude to Risk

People who know me would describe me as a cautious person.



I feel comfortable about investing in the stock market.



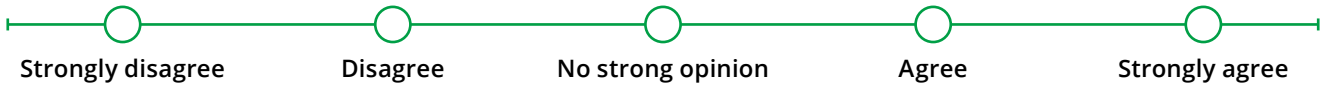
I generally look for safer investments, even if that means lower returns.



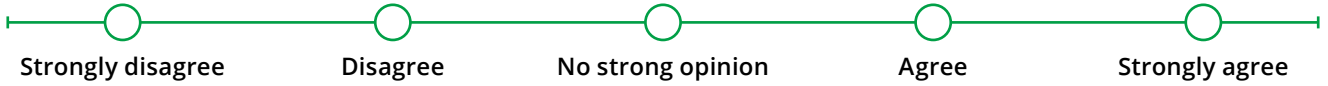
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Attitude to Risk (continued)

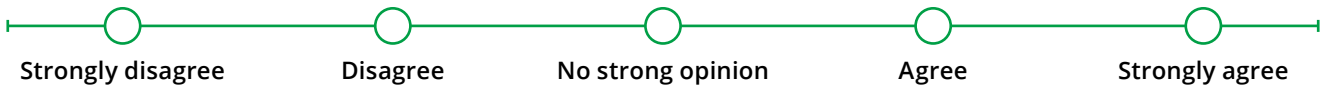
Usually it takes me a long time to make up my mind on investment decisions.



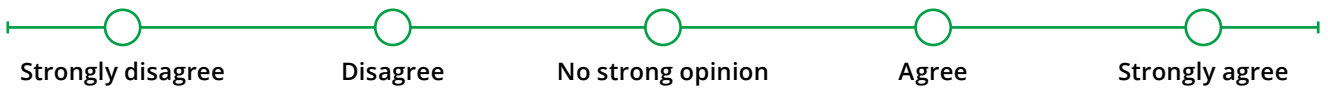
I associate the word "risk" with the idea of "opportunity".



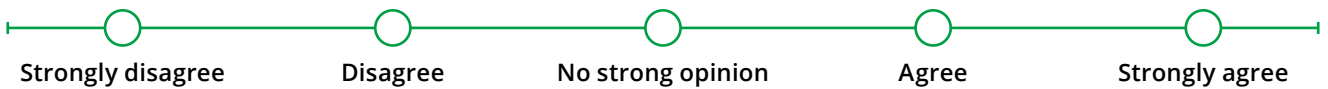
I generally prefer bank deposits to riskier investments.



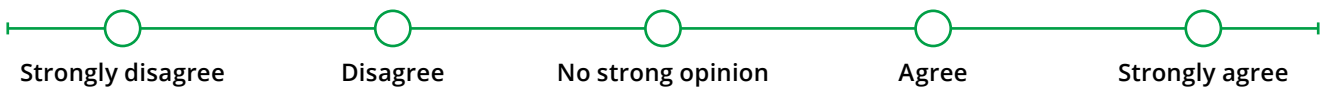
I find investment matters easy to understand.



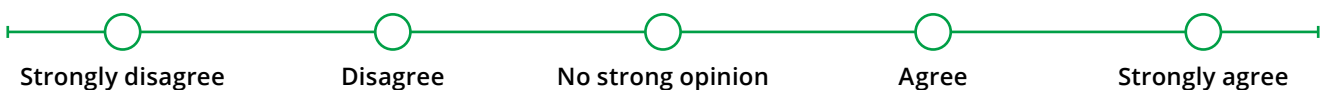
I'm willing to take substantial investment risk to earn substantial returns.



I've little or no experience of investing in stocks, shares, or investment funds.



I tend to be anxious about the investment decisions I've made.



Attitude to Risk (continued)

I'd rather take my chances with higher risk investments than have to save more.

Strongly disagree Disagree No strong opinion Agree Strongly agree

I'm not comfortable with the ups and downs of stock market investments.

Strongly disagree Disagree No strong opinion Agree Strongly agree

These responses need to be entered into the online 4D Profiler in order to generate a result.

Investment Focus (please mark a cross on the line when completing answers)

I would like to focus on increasing the value of my investment, knowing that this does not provide a regular income.	I would like my investment to provide a regular income and have the freedom to spend, bank or reinvest profits.
I would only like to focus on receiving an income from my investment.	I would like my investment to be made with a single focus on increasing its value.
I would like my investment to focus on the prospect of increasing its value using unlimited investment choices that are not constrained by the need to produce income.	I would like my investment to generate higher levels of income, although this may exclude certain investments that could have greater prospects to increase in value.

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Investment Style (please mark a cross on the line when completing answers)

I take comfort in the fact that when markets change, an investment expert may take action to adjust my investment.	I take comfort investing in a strategy that follows the market, and therefore has limited intervention when markets rise and fall.

Continued overleaf



Investment Style (continued)

<p>I would take the risk that decisions made by experts can be wrong, knowing that these changes could result in higher returns on my investment if correct.</p>	<p>I would not take the risk that experts managing my investments could make changes for the worse, knowing that I may also be missing out on higher returns.</p>
<p>I consider the potential returns of an investment to be more important than the cost.</p>	<p>I consider the cost of an investment to be more important than potential returns.</p>
<p>I would pay a higher cost to access a wider range of investment expertise.</p>	<p>I would prefer a lower cost at the expense of not having access to wider range of investment expertise.</p>

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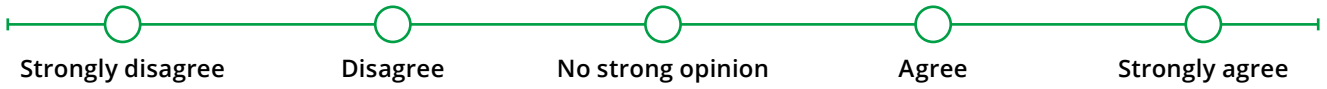
Responsible Investing

<p>It would excite me to know that my investments are having a positive impact on the environment and society at large.</p>
<p>I rarely think about how the behaviour of companies held in my investments impact the environment and society.</p>
<p>I would feel responsible if companies held in my investment have a negative impact on the environment and wider society.</p>
<p>Helping to improve working conditions and supporting communities is important for me.</p>

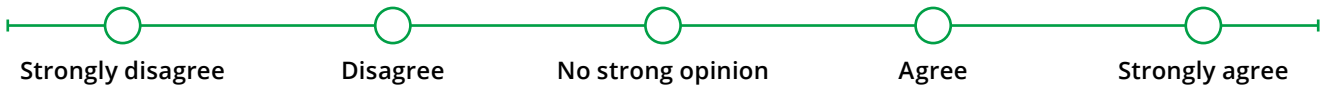


Responsible Investing (continued)

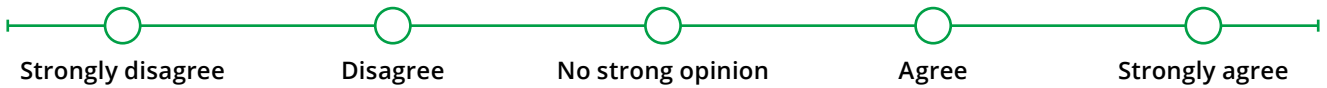
I would like to be proud of the way companies held in my investment manage their environmental and social risks.



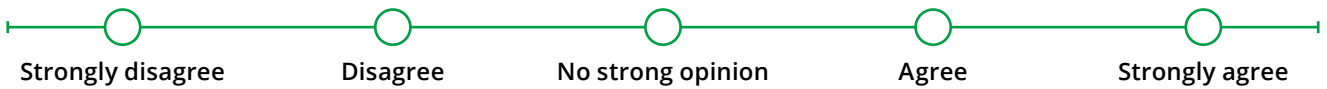
I would be happy with however a company behaves as long as its share price is not negatively affected.



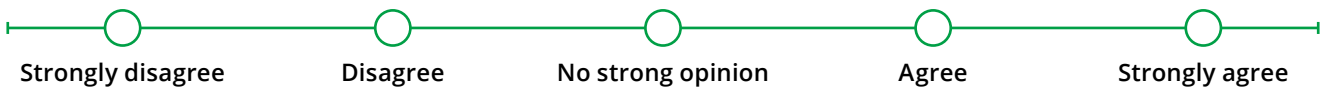
I actively engage in activities that lead to improvements within society and the environment.



It would be inspiring to see that companies held in my investment are actively working to manage their environmental and social risks.



I view my investment decisions separately to actions I take that impact the environment and society at large.



I would like to find a way of prioritising how my investments can deliver a positive impact on the environment or society, even if that means my returns may be lower or I have less choice.

