



Success Employee Benefits PTY(LTD)

An Authorised Financial Services Provider No:14400

CLIENT NAME: DOB: STATUS: SOURCE OF FUNDS:		
RISK PROFILER		
Would you consider yourself	Client Initial	Description
A conservative investor		Your primary goal is capital protection. You prefer stable income and/or capital growth at all times. Your portfolio will consist primarily of income orientated asset classes such as cash, bonds and property and contain little or no exposure to equities (higher volatility).
A cautious investor		Your primary goal is capital protection. You prefer fairly stable income and/or capital growth. While your portfolio will consist primarily of income orientated asset classes such as cash, bonds and property, you will introduce a greater element of equity exposure to provide the potential for higher growth over the long term.
A moderate investor		Your primary goal is capital growth. You are prepared to tolerate fluctuations in your short-term returns in anticipation of higher returns over the long term. Your portfolio will be diversified across all major asset classes. You portfolio may experience short-term negative returns.
A moderate aggressive investor		Your primary goal is capital growth. You are prepared to tolerate fluctuations in your short-term returns in anticipation of higher returns over the long term. Your portfolio will be diversified across all major asset classes with a slight bias towards equities. Your portfolio may experience short-term negative returns
An aggressive investor		Your primary goal is long-term capital growth. You are prepared to tolerate fairly significant fluctuations in your short-term returns in anticipation of higher returns over the long term. Your portfolio will be diversified across all major asset classes with a significant bias towards equities. Your portfolio may experience short-term negative returns.

Client Signature: _____ Date: _____

