

Investor profile questionnaire

Answer the questions below and total your score at the bottom.

STRONGLY AGREE AGREE NEUTRAL DISAGREE STRONGLY DISAGREE SCORE

1 The investment I am now considering represents the following percentage of my total investment portfolio:

80-100% 60-80% 40-60% 20-40% 20% or less

(1) — (2) — (3) — (4) — (5) — ()

2 In how many years do you expect to start spending the money you're investing?

1 year 2-5 years 6-10 years 11-20 years 21+ years

(1) — (2) — (3) — (4) — (5) — ()

3 I do not foresee any major expenses that might cause me to make withdrawals from this investment before that time.

(5) — (4) — (3) — (2) — (1) — ()

4 When I start making withdrawals from this investment, they will be used to fund my living expenses.

(1) — (2) — (3) — (4) — (5) — ()

5 When it comes to investing, protecting the money I have is my highest priority.

(1) — (2) — (3) — (4) — (5) — ()

6 I always choose investments with the highest possible return.

(5) — (4) — (3) — (2) — (1) — ()

7 I prefer an investment strategy designed to grow steadily and avoid sharp ups and downs.

(1) — (2) — (3) — (4) — (5) — ()

8 To meet my financial goals, my investments must grow at a high rate of return.

(5) — (4) — (3) — (2) — (1) — ()

9 I am unwilling to wait several years to recover from losses I incur in an extended down market.

(1) — (2) — (3) — (4) — (5) — ()

10 I prefer investments that are low risk, even if returns are lower than the rate of inflation.

(1) — (2) — (3) — (4) — (5) — ()

Scoring:

10-19

20-26

27-33

34-40

41-50

Corresponding portfolio:

A

B

C

D

E

SCORE TOTAL

The information provided in this worksheet should not be considered investment advice. You should consult your qualified financial professional to discuss your individual financial situation.

Use the letter that matches your score to identify the corresponding portfolio that may be best suited for your investments.

see reverse for details ▶

Investor profile questionnaire

Transfer your
score here →

Score total

A

10-19

Conservative

B

20-26

C

27-33

D

34-40

E

41-50

Aggressive

Use the letter that matches your score above to identify the corresponding portfolio description below. This portfolio provides an idea of the strategy that most closely matches your risk and return parameters.



Conservative Strategy seeks to provide high current income and low long-term capital appreciation.

16% Equities / 6% Real Assets / 78% Fixed Income



Moderate Strategy seeks to provide high current income and moderate long-term capital appreciation.

33% Equities / 9% Real Assets / 58% Fixed Income



Balanced Strategy seeks to provide above average capital appreciation and a moderate level of current income.

52% Equities / 10% Real Assets / 38% Fixed Income



Growth Strategy seeks to provide high long-term capital appreciation with low current income.

67% Equities / 14% Real Assets / 19% Fixed Income



Equity Growth Strategy seeks to provide high long-term capital appreciation.

80% Equities / 15% Real Assets / 5% Fixed Income

Fund objectives, risks, charges, and expenses should be carefully considered before investing. A prospectus containing this and other important information can be obtained by calling 800-787-7354 or by visiting www.russell.com. Please read the prospectus carefully before investing.

Neither strategic asset allocation or diversification assures a profit or guarantees against loss in declining markets.

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