



Moneymax® Financial Personality Profile

Name: _____ Date: _____

Address: _____ City: _____

Province: _____ Postal code: _____ Phone: _____

Fax: _____ E-mail: _____

Discover your financial personality.

This questionnaire is designed to help you learn about your financial personality. By better understanding your money management strengths and weaknesses, you'll be more comfortable and confident in making financial decisions. Working with your financial professional, you can use that knowledge to make financial decisions that fit your personal money management style.

Your questionnaire answers will be compared with those from thousands of others who participated in a nationwide research program. A Moneymax® Financial Personality Profile will be created and reviewed by your financial professional. Through this formal analysis, you and your financial advisor can gain a better understanding of your attitudes about money as well as the financial options and strategies that best meet your individual needs.

Goals and Objectives

Please read the following definitions of each investment attribute and then rank all four of these goals and objectives in the order of importance to you, from "Most" to "Least." Each rank may only be used once.

	Most	Second	Third	Least
1. CURRENT INCOME – Maximize current income from investments (high score indicates a desire for income now)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. GROWTH/APPRECIATION – Long-term growth with inflation hedge (high score indicates a desire to accumulate capital with the best rate of return)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. TAX ADVANTAGE – Maximum tax saving (high score indicates a goal of getting as much tax relief as possible)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. SAFETY – Perceived risk (high score indicated a desire for safe, low-risk investments)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Investment Preferences

The following questions pertain to individual investment preferences. Answer the first part of the question either "yes" or "no." If your answer is "yes" please choose a "Perceived Risk Level" and "Perceived Satisfaction Level." If your answer is "no" simply proceed to the next question.

	If Yes →		Perceived Risk Level			Perceived Satisfaction Level			
	Yes	No	High	Med	Low	High	Med High	Med Low	Low
5. I have previously invested in Canadian Equities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I have previously invested in International Equities or Shares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I have previously invested in Emerging Market Equities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I have previously invested in Domestic bonds or Bond Funds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. I have previously invested in International Bonds or Fixed Interest Investments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. I have previously invested in Emerging Market Bonds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. I have previously invested in High Yield Bonds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

See other side →

Following are some statements that could be used to describe a person's attitudes about financial decisions. For each statement, simply mark the box after the statement, which best describes how much you agree or disagree with that statement.

Please do not leave any questions blank. Although some may appear to be similar to others, it is important that you answer every question; otherwise we will be unable to determine your Moneymax® Profile.

I agree to keep these questions confidential.

	AGREE		DISAGREE	
	STRONGLY	SOMEWHAT	SOMEWHAT	STRONGLY
1. I Usually get depressed after making a financial decision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I spend money whenever I'm frustrated or angry and it releases the tension	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. People can always make money if they learn more about it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I would like to play an important and active role in managing my investments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Saving my money generally gives me greater satisfaction than spending it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I enjoy the feeling of "thrill" associated with gambling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I often reflect on my past financial results of decisions before I proceed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I feel there is no such thing as luck where money is concerned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. I feel panicky when I have to make a financial decision I wasn't expecting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. If people try hard enough, they will usually reach their financial goals in life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. I like to be highly involved in my investments and financial projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. I'm not looking for a secret way to get rich – I'm quite satisfied with the money I have	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. I feel it's a good idea to save my money instead of spending it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. While making financial decisions, I think about recent past financial decisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. The fact that chance or luck plays a significant role in my wealth is impossible for me to believe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. I am driven to acquire prestige with my money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. All in all, I am inclined to feel that I am a financial failure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Most people are basically honest when it comes to money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. I wish financial decisions did not bother me so much	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. I would like my financial pursuits to buy me fame	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. I live within my financial means and am content with what I have	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. I feel that I don't have much to be proud of as far as financial success is concerned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Most people will act as "Good Samaritans" with their money if given the opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. I want to use my money to become an important person in the community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. I spend money when I'm happy and it makes me feel better	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. People can be as successful with money as the time they're willing to devote to it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. I have as much money as I need to be happy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. Most people do not hesitate to go out of their way to help someone in financial trouble	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>