

Please complete this form, click the Submit button, and return it by email.

Name:

Please respond to each statement, where:

1 is Strongly Disagree and 5 is Strongly Agree.

1 2 3 4 5

I like to discuss investments.

Luck is something you make yourself.

Learning is an important key to financial success.

I would rather **not** manage my own finances.

I am often uncomfortable with my investments.

I keep well informed for everyday financial decisions.

I know where I'm going and how to get there.

I reflect on my past investments to see what I can learn.

Luck is an important factor in financial success.