



Zurich Risk Profiler



Important Additional Notes

The Zurich Risk Profiler is an illustrative tool designed to assist you in beginning to understand your attitude to risk, an important step before making an investment. The Zurich Risk Profiler does not constitute advice from Zurich Life. It is very important that you review your overall situation and investment needs with a Financial Advisor prior to making an investment.

A. What age are you?

B. How long do you intend to invest (in years)?

C. How would you describe your investment knowledge?

- Expert: I have an in-depth knowledge of how investments work.
- High: I have a good understanding types of investments and their risks.
- Moderate: I have knowledge of the basic types of investments and their risks.
- Little: I have little knowledge about investments and their risks.
- None: I have no investment knowledge.

D. What is your investment objective?

- To maximise returns, regardless of risk.
- To make high returns, without excessive risk to my capital.
- To make good returns, with limited risk to my capital.
- To make returns which beat inflation, without significant risk to my capital.
- To protect my capital.

E. How concerned would you be with a short term (6 months) 10% decline in your investment?

- Not concerned
- Slightly concerned
- Moderately concerned
- Very concerned
- Extremely concerned

F. What is your appetite for taking risk? If you invested €10,000 today, what range of potential values would you consider to be an acceptable return for your investment after 5 years?

- Between €6,300 and €17,200
- Between €6,800 and €16,300
- Between €7,900 and €14,000
- Between €8,900 and €12,100
- Between €9,800 and €11,600

G. What is your approach to taking risks? If you could increase the value of your investment by taking more risk, would you:

- Take a LOT more risk with ALL of your money.
- Take a LITTLE more risk with ALL of your money.
- Take a LITTLE more risk with SOME of your money.
- Be UNWILLING to take any more risk.

H. Financial emergency Do you have other savings available to you,should you encounter a financial emergency?

- No. I have no other savings I can use in the event of an emergency.
- I have other savings but nothing earmarked for a financial emergency.
- Yes. I have specific savings that I can use in an emergency.

I. Financial well-being If this investment were to perform poorly, what impact would this have on your financial well-being:

- It would have a big impact. This investment is required for a specific purpose.
- It would have some impact. I would need to make some adjustments to my future plans.
- It would have no impact, as I have other savings.

I am satisfied that my Risk Profile result selected above accurately reflects my attitude to risk.

If No, please provide details/concerns about the risk category. Please note the financial advisor must detail in the Statement of Suitability how the risk profile of the product aligns with the client's attitude to risk and attach a copy of the report.

Client	Advisor
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PRINT NAME _____

PRINT NAME _____

SIGNATURE _____

SIGNATURE _____

DATE _____