

Once you determine that p2p is a good addition to your broader investment portfolio, try to answer these 6 questions as a reference point for determining which of our three Fully-Managed strategies may be most appropriate for you. Each answer corresponds to a number of points. Add the points you earn for each question.

1) How old are you?

- a. 18-30 (4)
- b. 31-40 (3)
- c. 41-50 (2)
- d. 51-64 (1)
- e. 65+ (0)

2) How soon do you plan to begin withdrawing funds from your investments?

- a. Less than 5 years (0)
- b. 5-10 years (2)
- c. 11-20 years (3)
- d. 21 years or more (4)

3) How would you describe your knowledge of investments?

- a. None (0)
- b. Limited (1)
- c. Good (3)
- d. Expert (5)

4) The following choices represent hypothetical potential returns of portfolios with different levels of risk. Based on the maximum potential loss and potential growth, which would you prefer?

- a. -7% loss / 5% gain (0)
- b. -13% loss / 7% gain (3)
- c. -23% loss / 9% gain (6)
- d. -35% loss / 10% gain (8)

- 5) With my investments, I am most concerned about:
- a. My investments losing value (0)
 - b. The growth potential of my investments (4)
 - c. Both equally - possible losses and growth potential (2)
- 6) Which of the following investments do you currently own or have owned in the past?
(select all that apply and add points from each)
- a. Money Market Account (1)
 - b. Bonds (1)
 - c. Stocks, ETFs, or Mutual Funds (4)
 - d. Other Investments (1)
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Scoring

Total the number of points you earned and locate the corresponding range and strategy.

Total Number of Points	Strategy
0-15	Conservative
16-23	Balanced
24+	Assertive

If you have any additional questions regarding choosing the investment strategy most appropriate for you, please don't hesitate to contact our Investor Success Team.