Investment Research Group Limited
Level 13, 57 Fort Street, Auckland
PO Box 1314, Shortland Street, Auckland 1140
T + 64 9 358 3883 F + 64 9 358 3858
www.irg.co.nz

Client Investment Profile

The Client Investment Profile helps us understand your investment requirements.

From it we identify your risk tolerance, time horizons and investment objectives. We also get to know your past and current investments - and the level of investment you feel comfortable with now.

The information you supply enables us to develop a tailored portfolio meeting your requirements. We respect your privacy, so the information will be treated with strict confidentiality.

Please tick the box that best matches your position. In most questions you can only tick one box. You also have the opportunity to add any further comments at the end.

When you have completed your investment profile, fax it to us on +64 9 358 3858 or send it by mail to:

Investment Research Group Limited
PO Box 1314
Shortland Street
Auckland

Name: ______________________________

Address: ______________________________

Tel: ______________________________

Fax: ______________________________

Email: ______________________________

1. I'd describe my knowledge of investments as:

	✔
Non-existent	
Limited	
Average	
Strong	
Extensive	

2. Investments I currently own or have owned in the past include (select all that apply):

	✔
Term deposits	
Government or local authority stock	
Corporate bonds	
Shares, equity warrants, futures, options or unit trust investments	
International securities / international unit trusts	

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3. I plan to start withdrawing money from my investments for major needs in:

✔

Less than 3 years
Between 3 - 5 years
Between 6 - 10 years
More than 11 years

4. When I begin withdrawing money, I plan to spend it in:

✔

Less than 2 years
Between 2 - 5 years
Between 6 - 10 years
More than 11 years

5. When deciding how to invest my money, I think mostly about the possibility of:

✔

My investment losing value
My investment losing or gaining value in equal measures
My investment gaining value

6. Imagine that the stock market has dropped by 20% in value over the past three months. A share that you own has also dropped by 20% in value. My most likely reaction would be to:

✔

Sell all my shares
Sell some of my shares
Keep all my shares
Buy more shares

7. On a $10,000 portfolio, I'd feel most comfortable with the following range of values over one year:

✔

$9,440 - $10,500
$8,790 - $11,000
$8,180 - $11,500
$7,600 - $12,000
$7,200 - $12,500

Other comments I would like to add:

A free Disclosure Statement is available upon request