

Suitability Questionnaire

Name: _____

Date: _____

- 1) I plan to begin taking money from my investments in...
 - A. 1 year or less
 - B. 1-2 years
 - C. 3-5 years
 - D. 6-10 years
 - E. 11-15 years
 - F. 15 or more years

- 2) As I withdraw money from these investments, I plan to spend it over a period of...
 - A. 2 years or less
 - B. 3-5 years
 - C. 6-10 years
 - D. 11-15 years
 - E. 15 or more years

- 3) When making a long-term investment, I plan to keep the money invested for ...
 - A. 1-2 years
 - B. 3-4 years
 - C. 5-6 years
 - D. 7-8 years
 - E. 15 or more years

- 4) From September 2008 through November 2008, stocks lost more than 31% of their value. If I owned a stock investment that lost about 31% of its value in three months, I would... (If you owned stocks during this period, please select the answer that matches your actions at that time.)
 - A. Sell all of the remaining investment
 - B. Sell some of the remaining investment
 - C. Hold on to the investment and sell nothing
 - D. Buy more of the investment

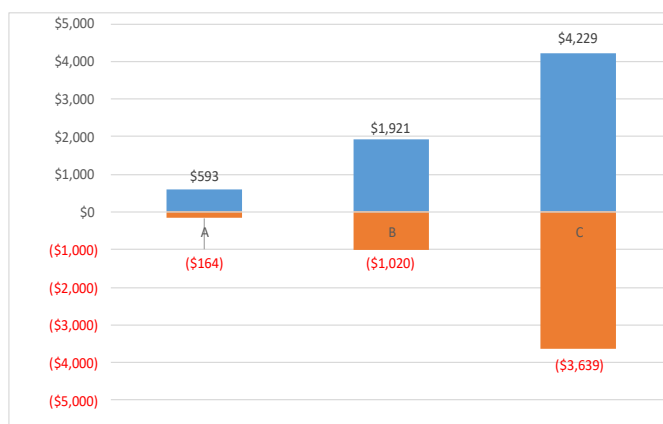
- 5) Generally, I prefer an investment with little or no ups or downs in value, and I am willing to accept the lower returns these investments may make.
 - A. I strongly disagree
 - B. I disagree
 - C. I somewhat agree
 - D. I agree
 - E. I strongly agree

- 6) When the market goes down, I tend to sell some of my riskier investments and put the money in safer investments.
 - A. I strongly disagree
 - B. I disagree
 - C. I somewhat agree
 - D. I agree
 - E. I strongly agree

- 7) Based only on a brief conversation with a friend, coworker, or relative, I would invest in a mutual fund.
 - A. I strongly disagree
 - B. I disagree
 - C. I somewhat agree
 - D. I agree
 - E. I strongly agree

- 8) From September 2008 through October 2008, bonds lost nearly 4% of their value. If I owned a bond investment that lost almost 4% of its value in two months, I would... (If you owned bonds during this period, please select the answer that matches your actions at that time.)
 - A. Sell all of the remaining investment
 - B. Sell some of the remaining investment
 - C. Hold on to the investment and sell nothing
 - D. Buy more of the investment

- 9) The chart below shows the highest one-year loss and the highest one-year gain on three different hypothetical investments of \$10,000.* Given the potential gain or loss in any one year, I would invest my money in...
 - A. Investment A
 - B. Investment B
 - C. Investment C



*The maximum gain or loss on an investment is impossible to predict. The ranges shown in the chart are hypothetical and are designed solely to gauge an investor's risk tolerance.

- 10) My current and future income sources (such as salary, Social Security, pension) are...
 - A. Very unstable
 - B. Unstable
 - C. Somewhat stable
 - D. Stable
 - E. Very stable

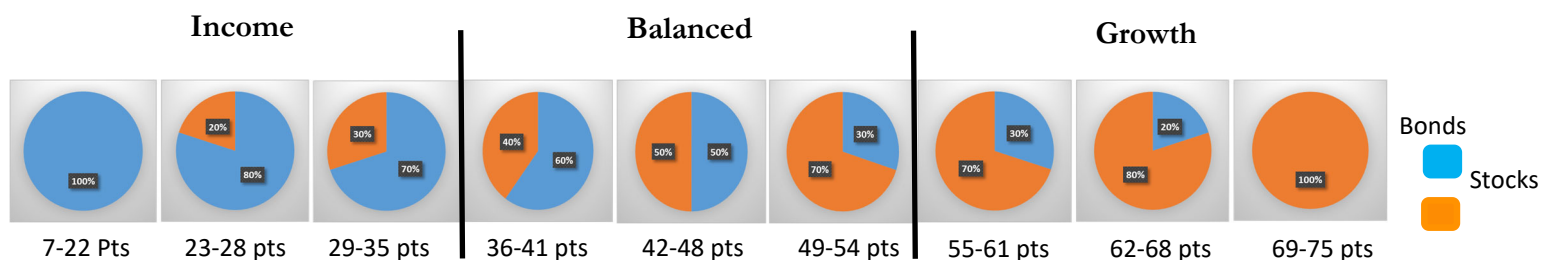
- 11) When it comes to investing in stock or bond mutual funds (or individual stocks or bonds), I would describe myself as...
 - A. Very inexperienced
 - B. Somewhat inexperienced
 - C. Somewhat experienced
 - D. Experienced
 - E. Very experienced

Tally your score

Use the following answer key to score your questionnaire. For example, if you answered “C” to question 1, give yourself 4 points.

Question	A	B	C	D	E	F	Points
1	0	1	4	7	12	17	
2	0	1	3	5	8	-	
3	0	1	3	5	7	-	
4	1	3	5	6	-	-	
5	6	5	3	1	0	-	
6	5	4	3	2	1	-	
7	5	4	3	2	1	-	
8	1	3	5	6	-	-	
9	1	3	5	-	-	-	
10	1	2	3	4	5	-	
11	1	2	3	4	5	-	
Add up your score and enter the total here:							

Find your suggested investment mix



Please note that a suggested investment mix is an example of a mix that the average person with your risk tolerance and investment time horizon may consider. If you do not feel that the suggested mix is right for you, you may decide to use a more conservative or a more aggressive mix.

A note about risk

All investing is subject to risk. Investments in bond funds are subject to interest rate, credit, and inflation risk.

Depending on the types of investments, there may be varying degrees of risk. Investors should be prepared to bear loss, including total loss of principal. The example allocations herein are not designed based on the individual needs of any one specific client or investor. In other words, it is not a customized strategy designed on the specific financial circumstances of the client. However, prior to opening an account using the advertised model, Cambridge will consult with you to determine if your financial objectives are appropriate for investing in the model. You are also provided the opportunity to place reasonable restrictions on the securities held in your account. Recommendations relating to this questionnaire will be based on the assumption that the answers to this questionnaire are complete, accurate, and reflect your current situation. Please notify your advisor promptly if your financial situation or any of the information contained in your questionnaire changes.

Investment advisory services offered through Booster, LLC

(410) 982-7505

Booster, LLC © 2021