



PURPOSE OF QUESTIONNAIRE

By answering the following questions, you will enable your advisor to identify the investment solutions that best suit your profile in order to attain your financial goals.

FACTORS CONSIDERED



Client's name:

\_\_\_\_\_

Date of birth:

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Type of account associated with this profile:

- RRSP, LIRA, locked-in RRSP, TFSA, Non-registered, LIF, RRIF, Other: \_\_\_\_\_

Main purpose of this account:

- Retirement income Steady disbursement, Major purchase: \_\_\_\_\_, Other: \_\_\_\_\_



### INVESTMENT HORIZON

When do you think you would need to use at least 25% of this investment ?

- within 3 years
- 3 to 7 years
- 8 years or more

### FINANCIAL SITUATION

In unforeseen circumstances, it is highly probable that I would use this investment.

- YES
- NO
- YES
- NO

### RISK TOLERANCE

**Hypothetical situation:** I invest \$100,000 and the markets start dropping. At what point do I become uneasy enough to call my advisor and reduce my strategy risk ?

- \$ 90,000
- \$ 80,000
- \$ 70,000
- Never

### INVESTMENT KNOWLEDGE

I keep up to date with the financial news. I understand the various types of investments and how they fluctuate over time.

- NO
- YES
- NO
- YES

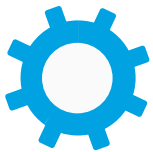
RECOMMENDED PROFILE	Liquidity 0 % equity	Conservative 40 % equity	Balanced 60 % equity	Growth 80 % equity	Aggressive 100 % equity
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RECOMMENDED SOLUTION BASED ON INVESTOR PROFILE

INVESTOR PROFILE

RECOMMENDED SOLUTION



Liquidity  
0 % equity



- ✓ RGP Impact Fixed Income Portfolio
- ✓ Redeemable GIC
- ✓ High-yield account



Conservative  
40 % equity



- ✓ **SectorWise** Conservative Portfolio
- ✓ **GreenWise** Conservative Portfolio



Balanced  
60 % equity



- ✓ **SectorWise** Balanced Portfolio
- ✓ **GreenWise** Balanced Portfolio



Growth  
80 % equity



- ✓ **SectorWise** Growth Portfolio
- ✓ **GreenWise** Growth Portfolio



Aggressive  
100 % equity



- ✓ RGP Global Sector Fund



**NOTES**

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