

SMSF Risk Questionnaire

Please ensure that all members have been risk profiled.

Client 1 Full Name/Entity

Client 2 Full Name/Entity

Question	Client 1	Client 2
<p>What is your experience with property investment?</p> <p>A: I don't own any property B: I only own the property I live in. C: I have some interest in investing in property D: I have been investing in property for many years</p>		
<p>If you were to invest in property how long would you expect to retain the property before selling?</p> <p>A: In 12 months, time B: Between 1 and 5 years C: Between 5 and 10 years D: For more than 10 years</p>		
<p>Property like all investments go up and down in value. How would you feel if property values went down?</p> <p>A: Panic and sell B: Keep a watching brief C: Hold tight and stick to my investment strategy D: See it as a buying opportunity</p>		
<p>Property is an illiquid asset. Do you have access to other liquid funds to meet emergency expenses if required?</p> <p>A: No. I Don't. B: I could manage for up to 6 months without selling C: I could manage for 12 months D: I have sufficient other investments to tide me over</p>		
<p>What is your attitude to borrowing to invest?</p> <p>A: I am not at all comfortable B: I am cautious and wouldn't want to borrow too much C: Borrowing is fine provided I am satisfied that I can fund the repayments D: Leverage is the best way to grow my investment</p>		
Total Score		

Score range

Outcome: A=1, B=2, C=3, D=4

5-8	Not suitable to invest in property
8-12	Suitable but with less than 50% LVR (subject to affordability)
12 -15	Suitable but with less than 60% LVR (subject to affordability)
>15	Suitable subject to affordability

Adviser Signature:

Date Completed:

Client 1 Signature

Date Completed:

Client 2 Signature

Date Completed: