



Champion Advisors LLC
Wealth Management

9. I plan on withdrawing income from assets under management earmarked for retirement in:

- 0-3 years 3-5 years 5-10 years 10-20 years 20+ years

10. The chart below shows the greatest one-year gain and loss per \$100,000 on three different hypothetical portfolios. Given the potential gain or loss in any one year, I would invest in:

	<input type="checkbox"/> Portfolio A	<input type="checkbox"/> Portfolio B	<input type="checkbox"/> Portfolio C
MAX GAIN	\$6,000 6.0%	\$19,300 19.3%	\$42,400 42.4%
MAX LOSS	-\$1,700 -1.7%	-\$10,300 -10.3%	-\$33,900 -33.9%

11. If an investment loses money over the course of a year, I can easily resist the temptation to sell it:

- 1 2 3 4 5 6 7 8 9 10
Strongly Disagree Somewhat Agree Strongly Agree

12. Do you agree or disagree with the following comment?

“I am willing to risk significant declines in the value of my investment if it will increase the likelihood of achieving significantly higher long-term returns.”

- 1 2 3 4 5 6 7 8 9 10
Strongly Disagree Somewhat Agree Strongly Agree

13. Which situation best describes your return expectations from your portfolio?

- I just want to preserve my investment capital.
- My return should keep pace with inflation (minimum volatility).
- My return should be slightly more than inflation (some volatility).
- My return should significantly exceed inflation (I accept volatility).

14. Please choose the phrase that best describes your current state. “These assets are:”

- Critical to my current and future financial well-being; I have few other assets and/or few sources of current and future income.
- A significant portion of my wealth; I have other assets and additional sources of current and future income.
- Fairly small in relation to my overall wealth and my other sources of current and future income.

