



Investor Profile

The purpose of this questionnaire is to classify your risk tolerance for retirement. The results can be used as a guideline to help you choose the appropriate investment mix in order to reach your savings goals. For each question, enter the number of points that corresponds to your answer. The scoring key at the end of the quiz will show your particular profile.



Points	0	1	2	3	4	Tally
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1. What is your current age?

Over 60	50-59	40-49	30-39	Under 29	
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2. How would you rate your current level of investment knowledge/ understanding?

Poor	Limited	Average	Good	Excellent	
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3. What is the approximate value of your current combined retirement savings

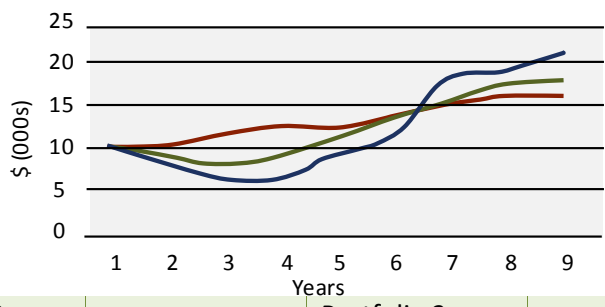
Age <45	-	-	Over \$250,000	\$100,000 - \$250,000	\$0-\$99,000	
Age >45	Over \$1,000,000	\$500,000-\$1,000,000	Under \$500,000	-	-	

4. How many years until you begin to take money from your retirement savings?

0-5	6-10	11-20	21-30	31-40+	
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5. This chart represents the hypothetical growth of a \$10,000 investment for three accounts over the next nine years. Which portfolio would you prefer?

- Portfolio 1
- Portfolio 2
- Portfolio 3



Portfolio 1	-	Portfolio 2	-	Portfolio 3	
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6. My retirement income will be satisfactory with only my 401(k).

Strongly agree	Agree	Neutral	Disagree	Strongly disagree	
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Points **0** **1** **2** **3** **4** **Tally**

7. What stage are you in life?

Retired	Semi-retired	Late stage career	Early-mid stage career	Beginning career	
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8. What is the number of consecutive years you would be willing to accept your account performance to be flat or negative?

0 years	1 year	2 years	3 years	4+ years	
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9. My retirement goals have been obtained. I wish for my account to maintain its value with some income.

Strongly agree	Agree	Neutral	Disagree	Strongly disagree	
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10. I will need to make withdrawals from my account within the next five years.

Strongly agree	Agree	Neutral	Disagree	Strongly disagree	
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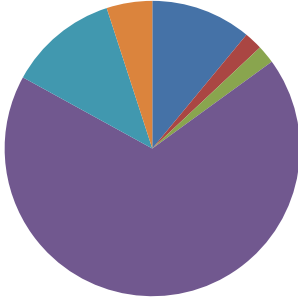
Add up your points and match your score with your portfolio! Refer to the Investor Profile worksheet for more detail on the portfolio that matches your score from this questionnaire.

Total Points: _____

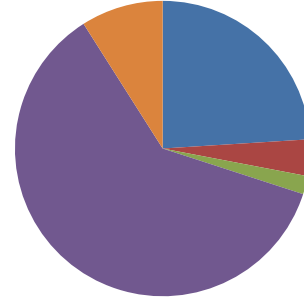
Your Investor Profile				
0-7 points	8-15 points	16-24 points	25-32 points	33-40 points
Conservative	Moderate Conservative	Moderate	Moderate Aggressive	Aggressive

Your Investor Profile: _____

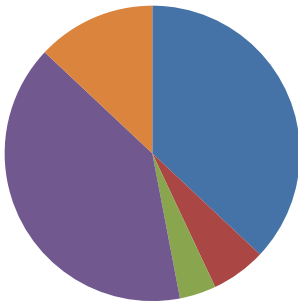
Portfolio Allocation



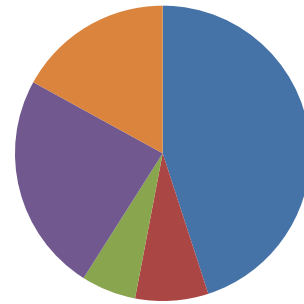
Conservative Allocation	%
U.S. Large	11
U.S. Mid	2
U.S. Small	2
Core Fixed	68
Short Term	12
International	5



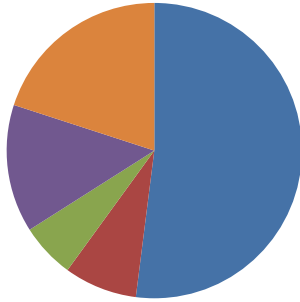
Moderate Conservative Allocation	%
U.S. Large	24
U.S. Mid	4
U.S. Small	2
Core Fixed	61
Short Term	0
International	9



Moderate Allocation	%
U.S. Large	37
U.S. Mid	6
U.S. Small	4
Core Fixed	40
Short Term	0
International	13



Moderate Aggressive Allocation	%
U.S. Large	45
U.S. Mid	8
U.S. Small	6
Core Fixed	24
Short Term	0
International	17



Aggressive Allocation	%
• U.S. Large	52
• U.S. Mid	8
• U.S. Small	6
• Core Fixed	14
• Short Term	0
• International	20

Note: Weights are meant to be representative of actual model weights and may vary.

Fund Breakdown

Build your own Lineup

U.S. Equities

U.S. Large:

- Alger Capital Appreciation Ptf I-2
- Columbia Large Cap Index Z
- American Beacon Bridgeway Large Cap

U.S. Mid:

- Wells Fargo Spec Mid Cap Value
- Columbia Mid Cap Index Z
- T. Rowe Price Mid-Cap Growth

U.S. Small:

- Columbia Small Cap Index Fund Z
- Lord Abbett Developing Growth I
- Principal Small Cap Value II

Fixed Income

Core:

- BlackRock U.S. Total Bond Index K
- GW US Govt. Mort. Sec. I
- BlackRock Total Return Instl

Short Term:

- Key Guaranteed Portfolio

International:

- Artisan Global Value Investor
- American Funds EuroPacific Gr R5
- T. Rowe Price International Equity

Specialty:

- T. Rowe Price Health Sciences

Or

Choose a Model Portfolio

Asset Allocation

- Great-West Lifetime 2015 Trust (Prior to 1953)
- Great-West Lifetime 2020 Trust (1953-1957)
- Great-West Lifetime 2025 Trust (1958-1962)
- Great-West Lifetime 2030 Trust (1963-1967)
- Great-West Lifetime 2035 Trust (1968-1972)
- Great-West Lifetime 2040 Trust (1973-1977)
- Great-West Lifetime 2045 Trust (1978-1982)
- Great-West Lifetime 2050 Trust (1983-1987)
- Great-West Lifetime 2055 Trust (1988-Present)