## **Your investing needs** Client questionnaire

<b>BMO Nesbitt Burns</b>
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## Information about you

	Ir. 🗆 Mrs. 🗆 Miss.					
Na	ame:					
En	mail:					
	ersonal informatio		ing questions to	o help us have better und	erstanding of your needs and goals.	
1.	After work and family, how many hours a week are you able to dedicate towards following your portfolio? Hours					
2.	. Describe your current					
	□ Limited □	Average	□ Good			
3.	<ul> <li>Do you want to be involved in the decision-making process when choosing investments?</li> <li>Yes</li> <li>No</li> </ul>					
4.	Have you ever created or implemented a financial plan or investment strategy?					
5.	Do you have any specific return expectations for your portfolio?         □ Risk averse (2-3%)       □ Balanced (4-6%)       □ Growth (7-10%)       □ Aggressive (11+%)					
6.	At what level of short-term investment losses do you become uncomfortable? Risk averse $\Box$ (10%) $\Box$ (20%) $\Box$ (30%) $\Box$ Willing to accept large losses					
7.	What worries you? W	What worries you? What keeps you up at night?				



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