

## | Mackenzie Monthly Income Portfolios

# Investor questionnaire

## Personal information

Client name ..... Email address .....

Telephone number ..... Date .....

## Personal situation

### 1. Which of the following best describes your employment situation?

- Retired ..... 0 pts
- Soon-to-be retired ..... 2 pts
- Employed part time ..... 4 pts
- Employed full time ..... 6 pts

### 2. What is the value of the assets that you plan to draw income from?

- Under \$50,000 ..... 0 pts
- \$50,001 – \$150,000 ..... 2 pts
- \$150,001 – \$300,000 ..... 4 pts
- \$300,001 to \$500,000 ..... 6 pts
- \$500,001 and over ..... 8 pts

### 3. What percentage of income do you expect to draw from your investments?

- Less than 4% ..... 6 pts
- Between 4% to 6% ..... 4 pts
- Between 7% to 10% ..... 2 pts
- Greater than 10% ..... 0 pts



#### 4. How many years until you expect to start withdrawing from your investments?

- Less than 5 years ..... 0 pts
- 5 to 10 years ..... 2 pts
- 10 to 15 years ..... 4 pts
- 15 to 20 years ..... 6 pts
- Over 20 years ..... 8 pts

#### 5. If leaving an inheritance is a goal, which statement best describes your approach?

- Preserve its value for beneficiaries ..... 0 pts
- Balance preservation and growth ..... 2 pts
- It is not a primary goal ..... 4 pts
- Grow its value for beneficiaries ..... 6 pts

#### 6. If your investment value dropped after one year, how would you respond?

- Cut your losses, sell your investments and hold cash with your entire account balance ..... 0 pts
- Sell half your investments and hold cash; keep remainder invested as is ..... 2 pts
- Hold the portfolio and make no changes ..... 4 pts
- Take advantage of the lower price and invest more money ..... 8 pts

Overall score ..... pts

#### Mackenzie Monthly Income Portfolios scoring grid

Total score	Recommendation
0 to 12	Mackenzie Monthly Income Conservative Portfolio
13 to 28	Mackenzie Monthly Income Balanced Portfolio
29 to 42	Mackenzie Monthly Income Growth Portfolio

### Ask your financial advisor about [Mackenzie Monthly Income Portfolios](#).

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments and the use of an asset allocation service. Please read the prospectus of the mutual funds in which investment may be made under the asset allocation service before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.