ADVISOR NETWORKS LLC
Member FINRA/SIPC

INVESTOR PROFILE QUESTIONNAIRE SCORING

Once your client has answered the questions on the Investor Profile Questionnaire, use the scoring grid below to determine which of the suggested portfolio allocations matches their personal assessment. That portfolio's allocations can be used to help develop investment selections that may be right for your client's financial objectives.

Please add up the scores from Q1 – Q8 on the Investor Profile Questionnaire.

Investment Objective		Income Expectation		Risk Tolerance		Loss Aversion		Continued Loss	
Q1	Score	Q2	Score	Q3	Score	Q4	Score	Q5	Score
A	2	A	1	A	4	A	4	A	5
B	6	B	2	B	5	B	5	B	6
C	9	C	3	C	6	C	6	C	7
D	16	D	4	D	8	D	7	D	8
E	24	E	5						

Financial Sophistication Monitoring		Financial Sophistication Experience		Investment Time Horizon	
Q6	Score	Q7	Score	Q8	Score
A	2	A	2	A	10
B	3	B	3	B	15
C	4	C	4	C	23
		D	5		

Total score: ________________

Suggested Equity and Fixed Income Ranges and Scoring

Portfolio	Equity Range	Fixed Income Range	Score
Conservative Income	0-35	65-100	0-41
Balanced	35-55	45-65	42-52
Moderate Growth	50-70	30-50	53-65
Growth	70-90	10-30	66-77
Aggressive Growth	85-100	0-15	78-88

Cetera Advisor Networks LLC has joined with ING Investment Management to provide the Classic and Expanded Asset Allocations and Portfolio Models. Cetera Models are offered through Cetera Advisor Networks as a service of Cetera Research Group.

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