

Appendix - Investment risk scale

Examples: 1 = Cautious and 10 = Adventurous

Risk Rating	Asset Allocation Example	
1	Cash 100%	
2	Cash 44% UK Corporate Bonds 5% International Corporate Bonds 5% UK Gilts 27% UK Equities 5%	European Equities 2% North American Equities 3% Property 20%
3	Cash 5% UK Corporate Bonds 20% International Corporate Bonds 15% UK Gilts 25% UK Equities 10%	European Equities 2% North American Equities 3% Property 20%
4	Cash 5% UK Corporate Bonds 33% UK Equities 27%	European Equities 3% North American Equities 10% Japan Equities 3% Property 19%
5	Cash 5% UK Corporate Bonds 22% UK Equities 29%	European Equities 8% North American Equities 10% Japan Equities 5% Asia ex-Japan Equities 3% Emerging Market Equities 5% Property 13%
6	UK Corporate Bonds 16% UK Equities 43%	European Equities 8% North American Equities 10% Japan Equities 5% Asia ex-Japan Equities 5% Emerging Market Equities 5% Property 8%
7	UK Corporate Bonds 8% UK Equities 50%	European Equities 8% North American Equities 10% Japan Equities 5% Asia ex-Japan Equities 7% Emerging Market Equities 10% Property 2%
8	UK Equities 57%	European Equities 5% North American Equities 8% Japan Equities 5% Asia ex-Japan Equities 10% Emerging Market Equities 15%
9	UK Equities 30%	European Equities 5% North American Equities 5% Asia ex-Japan Equities 30% Emerging Market Equities 30%
10	UK Equities 5%	Asia ex-Japan Equities 50% Emerging Market Equities 45%

IFA information. *Please complete on all pages to ensure we process your quote correctly.*

Name _____

Job Ref _____ Contact Tel. _____