VALUES FIRST ADVISORS RISK PROFILE

The purpose of this Risk Profile is to help us understand your investment objectives and tolerance for risk and to help to establish the basic framework in which we will manage your portfolio. For each item below, write 1 point if you strongly disagree, write 10 points if you strongly agree, or somewhere in between, as it relates to your portfolio.

Calendar

1. I plan to not withdraw significant assets from my portfolio for at least 10 years. (1-10) _____
2. I plan to keep these assets invested at the same risk level for at least 10 years. (1-10) _____
3. I plan to begin regular distributions from my portfolio in 10 years or more. (1-10) _____

Capacity

4. I have adequate protection – including life, property, and casualty insurance as well as cash on hand to cover 3-6 months of expenses (emergency fund). (1-10) _____
5. I have other assets including savings, investments, real estate, or retirement accounts. (1-10) _____
6. I have sufficient income that is expected to grow with inflation. (1-10) _____

Comfort

7. I am more interested in growing my portfolio than protecting it. (1-10) _____
8. I am committed to remaining invested if my account decreases by 20% in one year. (1-10) _____
9. I am excited when I think of risk in an investment context. I do not feel anxious. (1-10) _____

Please enter your Total Score from your answers above. The Allocation Table below suggests an allocation for you based on your Total Score from the above guidelines, but you may select a different allocation. The percentages of the portfolio's assets to be invested in equity and/or fixed income instruments are approximate and are measured at the time of the initial investment, and the portfolio's holdings will be reallocated periodically to bring the portfolio to within the parameters set forth below. A portion of the assets will be held in cash. **Please indicate below your selection of the allocation(s) in which you would like to invest your portfolio.**

Total Score

Indicate your Selection*	Total Score	Name of Suggested Allocation	Equity %	Fixed Income %
	9-17	Defensive	10	90
	18-30	Conservative	20	80
	31-44	Conservative with Growth	40	60
	45-57	Balanced	50	50
	58-71	Balanced with Growth	60	40
	72-84	Growth	80	20
	85-90	Aggressive	100	0
		Other		

_____	_____	_____
Client 1 Print Name	Client 2 Print Name (if applicable)	Advisor Print Name
_____	_____	_____
Client 1 Signature	Client 2 Signature (if applicable)	Advisor Signature
_____	_____	_____
Client 1 Date	Client 2 Date (if applicable)	Advisor Date

** The "Selection" column is not applicable to any account(s) custodied at Foliofn Investments, Inc., if any.*