

What are Your Investment Preferences?

Consider each pair of words below as a continuum. Place an "x" on each line of the continuum to indicate how important each of these features is to you. Marking the middle of a line would therefore mean that the features were of equal importance.

Low risk (Safety)		High risk
Low rate of return		High rate of return
Low capital growth	High	capital growth
High capital preservation		Low capital preservation
Not very liquid		Highly liquid
Short-term maturity		Long-term maturity
Taxable		Tax-exempt
No minimum investment		High minimum investment
Low costs and fees		High costs and fees
Little or no management required		Much management required
Present income		Capital growth
Conservative		Aggressive

Figure 5. What are Your Investment Preferences?

Adapted from: Hogarth, Jeanne and Swanson, Josephine (1987). TOPICs, Investment basics, Cornell University, 1987.