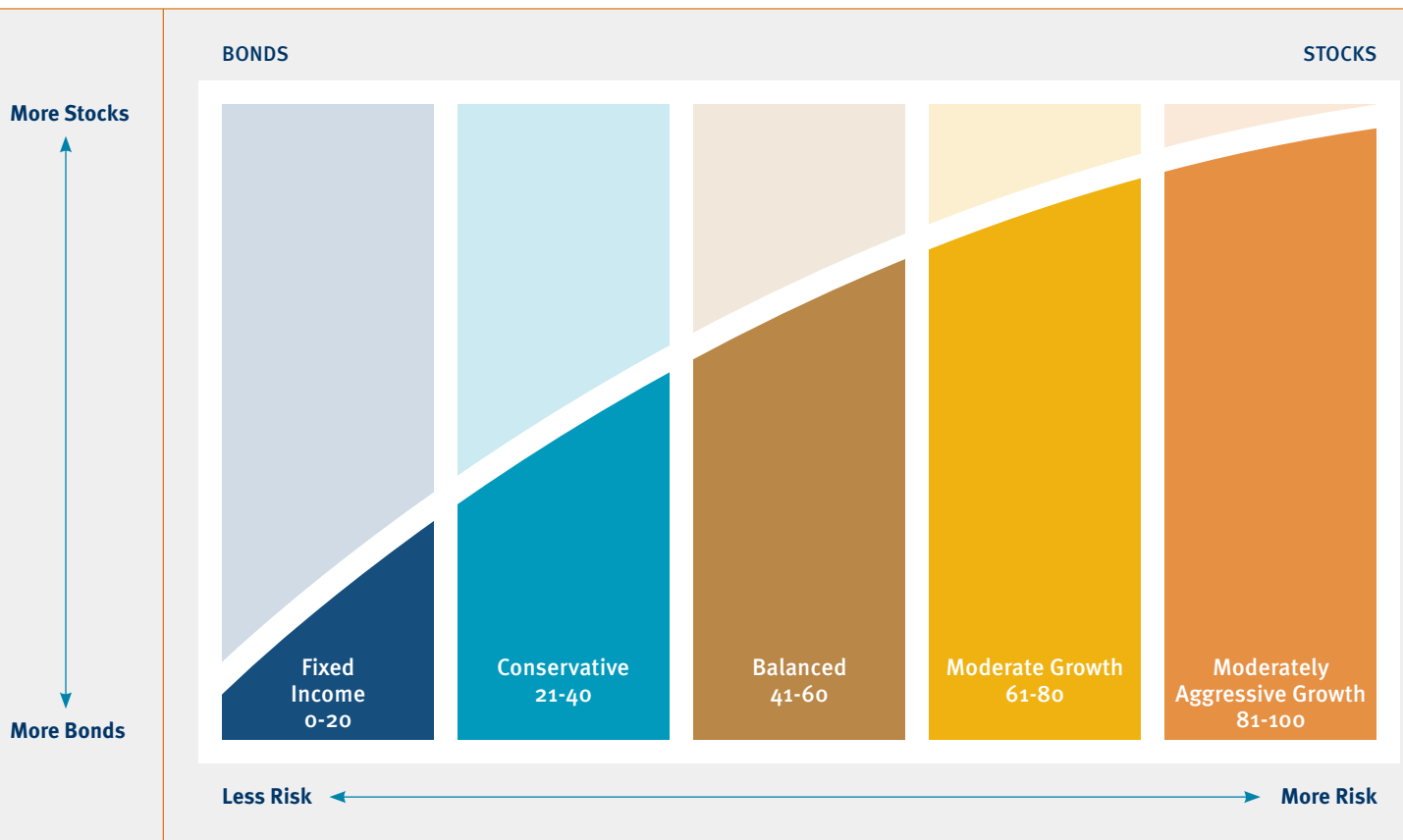




# WASHINGTON CROSSING ADVISORS

## Finding the Right Portfolio for You



Source: Washington Crossing Advisors, LLC. For illustrative purposes only. Actual results may vary. Indices are unmanaged, do not reflect fees and expenses, and are not available for direct investment. Assumes reinvestment of gains and dividends. Past performance is not a guarantee of future returns.

*“Dedicated to advancing the interests of clients and their trusted advisors.”*

WASHINGTON CROSSING ADVISORS, LLC  
305 Madison Avenue • Morristown, New Jersey 07960  
www.washingtoncrossingadvisors.com

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## Risk Assessment Questionnaire

Review each question and check the square next to the answer that is most applicable to you. Once you have completed the form, a risk assessment score will be calculated for you. This risk score will determine which investment portfolio on side one is right for you.

- To what extent do you agree or disagree with the following?**  
*Maximizing returns is more important than protecting my investment.*
  - Strongly Agree
  - Agree
  - Neutral
  - Disagree
  - Strongly Disagree
- To what extent do you agree or disagree with the following?**  
*I do not foresee any major expenses that would require significant principal withdrawals from this investment account in the next 5 years.*
  - Strongly Agree
  - Agree
  - Neutral
  - Disagree
  - Strongly Disagree
- What percentage of your total investable net worth (excluding primary residence) does this portfolio represent?**
  - Less than 20%
  - 20% to 40%
  - 40% to 60%
  - 60% to 80%
  - 80% to 100%
- On a long-term basis, what average annual rate of return best reflects your objective for “total return” on your portfolio?**
  - More than 10% per year
  - 8% to 10% per year
  - 6% to 8% per year
  - 4% to 6% per year
  - Less than 4% per year
- When do you expect this investment account to provide a regular source of income?**
  - Greater than 20 years
  - 10 to 20 years
  - 5 to 10 years
  - 3 to 5 years
  - 3 years or less
- What approximate loss in any one-year period would you be willing to accept before deciding to liquidate your investment?**
  - (25%) or greater loss
  - (15%) to (25%) loss
  - (10%) to (15%) loss
  - (5%) to (10%) loss
  - Minimal loss
- To what extent do you agree or disagree with the following?**  
*I have had prior experience with and understand the investment risk related to stocks, bonds, mutual funds, and other investments.*
  - Strongly Agree
  - Agree
  - Neutral
  - Disagree
  - Strongly Disagree
- To what extent do you agree or disagree with the following?**  
*My income is adequate and stable and my debt level is low.*
  - Strongly Agree
  - Agree
  - Neutral
  - Disagree
  - Strongly Disagree
- What do you believe is an adequate time frame for evaluating portfolio returns?**
  - More than 10 years
  - 5 to 10 years
  - 3 to 5 years
  - 1 to 3 years
  - Less than 1 year
- To what extent do you agree or disagree with the following?**  
*I am willing to wait several years to recover from losses I incur in an extended down market.*
  - Strongly Agree
  - Agree
  - Neutral
  - Disagree
  - Strongly Disagree

Please see the chart on side one to match your risk assessment score to your investment portfolio. TOTAL RISK ASSESSMENT SCORE: \_\_\_\_\_

### FOR MORE INFORMATION, PLEASE CONTACT US:

- **Kevin R. Caron, CFA**—Senior Portfolio Manager | (973) 549-4051 | kevin@washingtoncrossingadvisors.com
- **Chad A. Morganlander**—Senior Portfolio Manager | (973) 549-4052 | chad@washingtoncrossingadvisors.com
- **Matthew J. Battipaglia**—Portfolio Manager | (973) 549-4047 | matt@washingtoncrossingadvisors.com
- **Steven J. Lerit, CFA**—Head of Portfolio Risk Management | (973) 549-4028
- **Thomas J. Serzan**—Senior Equity Analyst | (973) 549-4335
- **Suzanne E. Ashley**—Client Relationship Manager | (973) 549-4168 | suzanne@washingtoncrossingadvisors.com

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All investments involve risk, including loss of principal, and there is no guarantee that investment objectives will be met. It is important to review your investment objectives, risk tolerance and liquidity needs before choosing an investment style or manager. Equity investments are subject generally to market, market sector, market liquidity, issuer, and investment style risks, among other factors to varying degrees. Fixed Income investments are subject to market, market liquidity, issuer, investment style, interest rate, credit quality, and call risks, among other factors to varying degrees. The results provided are based on generally accepted investment principles. There is no guarantee, however, that any particular results will meet your investment objectives.

All investments involve risks, and fluctuations in the financial markets and other factors may cause declines in the value of your account. You should carefully consider all of your options before investing and consult with your financial adviser. The Investor Questionnaire is provided to you free of charge. It does not provide comprehensive investment or financial advice. Washington Crossing Advisors is not responsible for reviewing your financial situation or updating the suggestions contained herein.

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All investments involve risk, including loss of principal, and there is no guarantee that investment objectives will be met. It is important to review your investment objectives, risk tolerance and liquidity needs before choosing an investment style or manager. Equity investments are subject generally to market, market sector, market liquidity, issuer, and investment style risks, among other factors to varying degrees. Fixed Income investments are subject to market, market liquidity, issuer, investment style, interest rate, credit quality, and call risks, among other factors to varying degrees.

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