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Menu 🛱 JML-Risk-Assessment-F 🗙 🕂 Cre	ote	
ools Édit ert Sign		Find text or tools Q 📋 🏟 🖗 🤌
l tools ×	JML FInancial Group Risk Tolerance Questionnaire	
Export a PDF		-
Edit a PDF	1 What type of returns are you seeking?	
Create a PDF	2 Income 3 Growth greater than Inflation 4 Maximum Growth Potential	
Combine files	2 In approximately how many years would you expect	to need this money?
Organize pages	2 1 - 3 years 3 3 - 7 years	to need this money:
Request e-signatures	4 7+ years	
Scan & OCR	3 Which one of the following describes your expected 1 l expect my earnings to decrease (retirement, part- time	
Protect a PDF	 1 expect my earnings to decrease (retriement, pare time 2 I expect my earnings to keep pace with inflation. 3 I expect my earnings increases to stay somewhat ahead 	
Redact a PDF	4 I expect my earnings increases will far outpace inflation	(due to promotions, new job, etc.)
Compress a PDF	4. How concerned are you that your savings and invest 2 Not very concerned	stment dollars outpace inflation?
Prepare a form	3 Moderately concerned 4 Highly concerned	
Fill & Sign	5 Very highly concerned	
Convert to PDF		uld be very concerned if my investments declined by 10%.
🧏 View more	 2 I accept some market fluctuations, but I would be somew 3 I generally invest for the long term and I would not be co 4 I invest for the long term and would accept a 10% declin 	oncerned with this decline.

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Scan & OCR	Spouse Name: Nickname:	DOB:
Protect a PDF	Current/Former Employer:	Retired:YESNO
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