

Completing Risk Profile Online

Click on Calculator

Hello Alex,
Welcome to your online client portal (combined with Pamela)

Your adviser contact details are
Lee, Alex
| e | alex.lee@arktotalwealth.com.au

Your financial summary

Your details

Summary	
Personal assets	\$110,000
Liabilities	\$250,000
Superannuation	\$100,000
Pension	\$0
Investment	\$100,000

Summary

Recent documents

Name	Status	Last modified
Reverse fact find (7/04/2014 4:06:44 AM)	None	07/04/2014
Reverse fact find (12/03/2014 8:05:20 AM)	None	12/03/2014

Calculators

Click Risk profile

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PLANNING FOR NOW

BUDGET
Are you spending more than you earn? Use this calculator to see if you have surplus income to create and protect wealth.

PLANNING FOR FUTURE

OBJECTIVES BUILDER
Interact with control by drag and drop them around the page

RISK PROFILE
How worried are you about the risks associated with investing? Answer a few simple questions to determine your appetite for risk.

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DETAILS

ANALYSIS

CALCULATOR

PRINT REVERSE FACTFIND

SUBMIT DETAIL

Then complete the 8 questions

Risk profile

Combine Alex & Pamela's answers in determining attitude to investment risk?

Alex Lee Please complete all questions

1. How long do you expect to invest your superannuation account?

Up to 1 year

1 to 3 years

3 to 7 years

7 to 10 years

10 to 20 years

More than 20 years

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