

What's your Investment Personality ?

Whether your goal is financial security in retirement or funding postsecondary education for your children, it's important to choose investments that match your philosophy and personality.

Hands-on or hands-off?

Some investors are very hands-on. They follow financial and market trends closely, and want to be very involved in investment decisions with their advisor. An active investor is more likely to adjust his or her portfolio regularly, in an attempt to profit from changing market conditions. If you're a hands-on investor, you can benefit from professional input and expertise when adjusting your portfolio mix.

Risk tolerance

How much volatility are you really comfortable with? Are you comfortable with equities whose price may increase or decrease daily, monthly, or yearly? Can you accept the potential risk of short-term losses, knowing that you have a good chance of earning higher returns over a period of 10 years or more? Or are you more comfortable with investments that generate a stable, but modest, return from year to year? Whether your risk tolerance is low, moderate, or high, it's important to diversify by spreading your investments among the three main asset classes: equities, fixed-income and cash and cash equivalents. When investing with an Investment Advisor or on your own, take the time to understand your investment philosophy and personality.

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