



Please answer the following question sincerely. There are no «good» or «wrong» answers.

1. In how many years do you want to retire?

- A I'm already retired
- B 0 to 4 years
- C 5 to 9 years
- D 10 to 20 years
- E More than 20 years

2. What is your gross annual income (before taxes)?

- A Less than \$25,000
- B \$25,000 to \$44,999
- C \$45,000 to \$69,999
- D \$70,000 to \$99,999
- E \$100,000 or more

3. What is your approximate net worth, defined as your total assets (including your residence) less your total liabilities (including your mortgage)?

- A Less than \$25,000
- B \$25,000 to \$44,999
- C \$45,000 to \$69,999
- D \$70,000 to \$99,999
- E \$100,000 or more

4. What percentage of your gross annual income do you save?

- A Moins de 5%
- B 5% à 10%
- C 11% à 15%
- D 16% à 20%
- E 21% et plus

5. When do you plan on needing the money you are investing?

- A Less than a year
- B 1 to 3 years
- C 4 to 6 years
- D 7 to 9 years
- E 10 years or more

6. What is your main investment goal?

- A Keeping your investments secure
- B Maintaining certain stability
- C Seeing your investments grow
- D Seeing your investments grow significantly
- E Obtain maximum long-term growth

7. What your reaction be if you noticed that the value of your investments dropped from \$10,000 to \$9,000\$, meaning a 10% loss?

- A You would never invest in any product where the capital is not guaranteed
- B You would immediately sell your investments
- C You would wait a while before making a decision
- D You would not change anything and maintain your investment strategy
- E You would invest in additional funds

8. What is your level of knowledge with regards to investments?

- A Poor
- B Limited
- C Moderate
- D Good
- E Very good

9. To what category do you belong to?

- A A retired single person (or a retired couple)
- B A single person (or a couple) whose children left home
- C A single person (or a couple) with dependent children with the youngest aged 7 years or older
- D A single person (or a couple) with dependent children with the youngest aged 6 years or younger
- E A single person (or a couple) without children

9 TO 24 POINTS

conservative

Your investment horizon is short or you prefer to simply take fewer risks. Security is your biggest concern.

25 TO 34 POINTS

moderate

Your investment horizon is long enough to make sure that you get a balance between growth and security.

35 TO 45 POINTS

aggressive

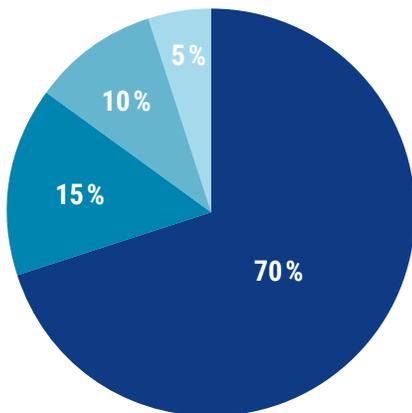
Your main concern is seeking the best long-term return above all. You are able to accept major fluctuations in your short-term portfolio.

Example of portfolios of Mercury Funds

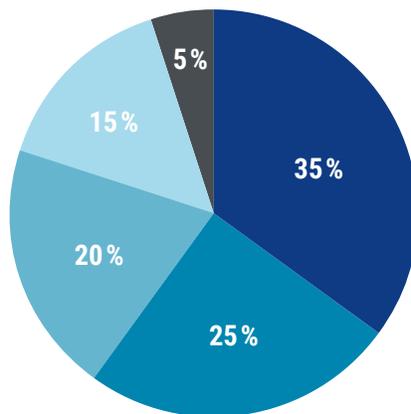
Mercury Canadian Equity 60
Mercury Zero coupon

Mercury US Equity Index 500
Mercury Technology Equity Index 100

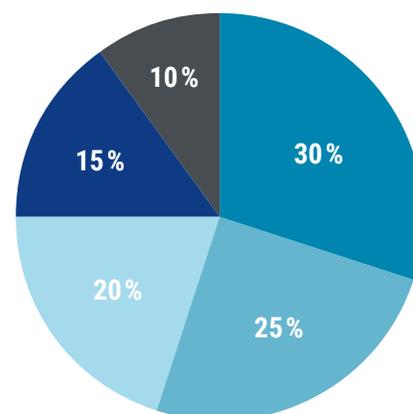
Mercury Global Equity Index MSW



conservative



moderate



aggressive

Financial advisor

Name _____

Signature _____

Date _____

Client

Name _____ Profile _____

Address _____

Tel. (home) _____ Tel. (work) _____

Email _____ Signature _____

What Is Your Investor Profile? is a tool to assist you and determining your risk tolerance. However, it is not intended to replace a comprehensive analysis of your financial situation. UL Mutual is not liable for damages that may result from the use of this questionnaire. Any amount allocated to a segregated fund is invested at the risk of the contractholder and may increase or decrease in value.