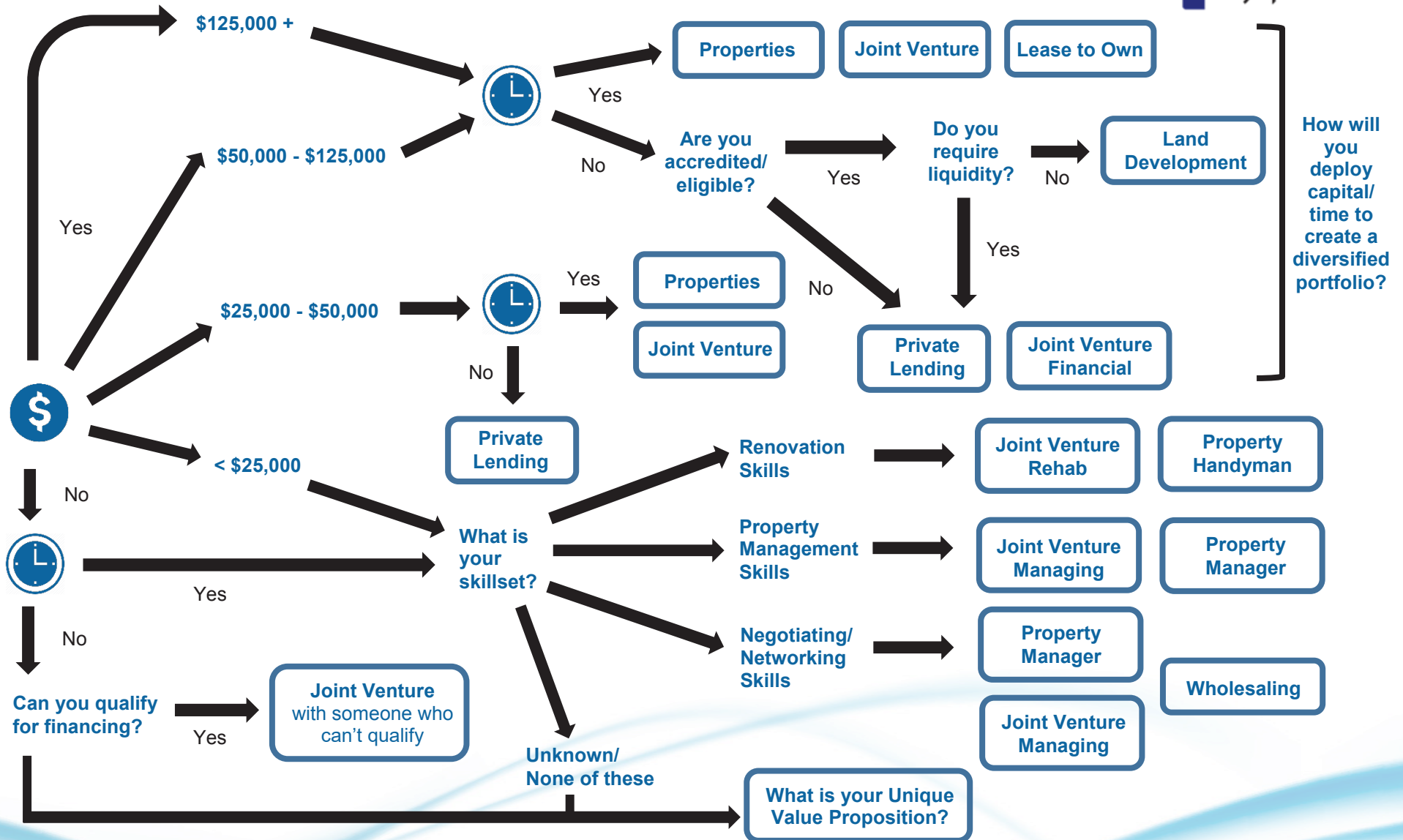


# A Guide to Determining your Investor Profile



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## Factors to Consider when Choosing an Investing Steam and/or Strategy

1. How much capital do you have available to invest? \_\_\_\_\_
2. Where is the capital coming from (cash, RSPs, HELOC, business income, etc.) \_\_\_\_\_
3. How much time (per week/month) do you have available to execute the investment? \_\_\_\_\_
4. How much annual cash flow do you require from your investment? \_\_\_\_\_
5. How important is liquidity to you? \_\_\_\_\_
6. List the personal skills and experience you will bring to the investment  
\_\_\_\_\_
7. Do you anticipate an upcoming life changes that will affect your income, requirement for capital, time available, or ability to invest?  
\_\_\_\_\_
8. What is your personal risk profile for investing (low, medium, high)? \_\_\_\_\_
9. Do you have any personal preferences or perceptions regarding specific investment types/strategies that may affect your ability to invest and your comfort level to invest?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Questions to Consider when Choosing an Investment

1. How much capital is required for the investment? \_\_\_\_\_
2. How much of your time is required for the investment? \_\_\_\_\_
3. What is the total length of the investment (term)? \_\_\_\_\_
4. How will you receive your return? \_\_\_\_\_
5. How liquid is the investment? \_\_\_\_\_
6. What is the total ROI? \_\_\_\_\_
7. Is the ROI enough for you? \_\_\_\_\_