

## QUESTIONNAIRE

Print and complete. Please scan and email to [info@michaelmendonca.com](mailto:info@michaelmendonca.com) or  
fax to Michael Mendonca at 949.362.1957

1. What is the expected time horizon of this account, i.e. when will need to use this money?  
 3 Years  
 5 Years  
 10Years  
 15 Years  
 20Years  
 Greater than 20 years
  
2. I am prepared to sacrifice some safety for higher returns.  
 Disagree  
 Somewhat Disagree  
 Somewhat Agree  
 Agree
  
3. I am willing to accept some risk in an effort to stay ahead of inflation.  
 Disagree  
 Somewhat Disagree  
 Somewhat Agree  
 Agree
  
4. I am willing to accept fluctuating returns in order to achieve my goals.  
 Disagree  
 Somewhat Disagree  
 Somewhat Agree  
 Agree
  
5. From time to time, I can tolerate negative returns.  
 Disagree  
 Somewhat Disagree  
 Somewhat Agree  
 Agree
  
6. I am willing to accept higher volatility to achieve above average returns.  
 Disagree  
 Somewhat Disagree  
 Somewhat Agree  
 Agree

Signature \_\_\_\_\_ Date \_\_\_\_\_