

Feed your Future

After you answer the questions below:

1. Total your score in the bottom right hand box.
2. Review the corresponding managed portfolio on the next page to get a detailed description of the characteristics of your risk profile.

What type of investor are you?

This questionnaire helps get to the heart of who you are as an investor, by asking you to answer some basic questions about your goals, time frame, and attitude toward risk. Your total score will help to determine your next steps. Answer as best and honestly as you can.

TIME HORIZON — Your current situation and future income needs.

	5 points	4 points	3 points	2 points	1 point	Score
What is your current age?	Less than 45	45 to 55	56 to 65	66 to 75	Older than 75	
When do you expect to start drawing income?	Not for at least 20 years	In 10 to 20 years	In 5 to 10 years	Not now, but within 5 years	Immediately	

GOALS/EXPECTATIONS — Your views of how an investment should perform over the long term.

	5 points	4 points	3 points	2 points	1 point	Score
What is your goal for this investment?	To grow aggressively	To grow significantly	To grow moderately	To grow with caution	To avoid losing money	
Assuming normal market conditions, what would you expect from this investment over time?	To generally keep pace with the stock market	To slightly trail the stock market & make good profits	To trail the stock market, but make a moderate profit	To have some stability, but make modest profits	To have a high degree of stability & make small profits	
If stocks perform very poorly over the next decade, what would you expect from this investment?	To lose money	To make very little or nothing	To make out a little gain	To make a modest gain	To be affected little by the stock market	

SHORT-TERM RISK PROFILE — Your attitude toward short-term volatility.

	5 points	4 points	3 points	2 points	1 point	Score
Which of these statements describe your attitude about the next three years' performance of this money?	I don't mind if I lose money	I can tolerate a loss	I can tolerate a small loss	I'd have a hard time dealing with a loss	I need to see at least a little return	
Which of these statements describe your attitude about the next few months' performance of this money?	Who cares, 3 months means nothing	I wouldn't worry about losses in that time frame	A loss of more than 10% would concern me	I can only tolerate short-term losses	I'd have a hard time stomaching any losses	

Printed name:

Signature:

Date:

TOTAL

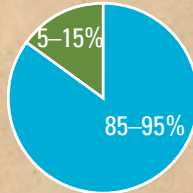


Investor models

FIT Aggressive Portfolio

Score 32–35

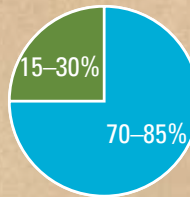
Best suited for investors who are seeking maximum appreciation, and willing to accept a higher level of volatility and risk to achieve that goal.



FIT Growth Portfolio

Score 25–31

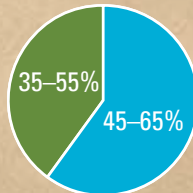
Best suited for investors who are seeking portfolio appreciation, and willing to accept a higher level of volatility and risk to achieve that goal.



FIT Balanced Portfolio

Score 18–24

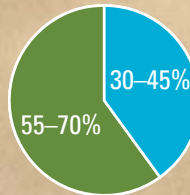
Best suited for investors who are seeking moderate growth while also looking for below market volatility.



FIT Moderately Conservative Portfolio

Score 11–17

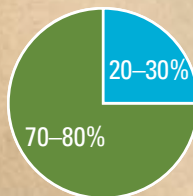
Best suited for investors who are reluctant to risk substantial short-term losses or who will need to pay for financial goals in the near term, but who still seek capital appreciation.



FIT Conservative Portfolio

Score 7–10

Best suited for investors who are reluctant to risk substantial short-term losses or who will need to pay for financial goals in the near term, but who still seek income.



Note: The custom models (and/or questionnaire) for the Jerry's Enterprises Retirement Plan were created by the plan's investment advisor: Brad Holdhusen, Qualified Plan Advisors, bholdhusen@lawingfinancial.com

Allocation of assets*

■ Stock/Equity focus

■ Bond/Cash focus

*Percentages listed are median targets.

Use your score from the previous page to identify the Fit Managed portfolio that may be suited for your retirement investments.

Note: McCready and Keene provides administrative and recordkeeping services and is not a broker/dealer or an investment advisor. Neither McCready and Keene nor its employees provide tax, legal, fiduciary or investment advice. • These portfolios are based upon broad definitions used by Fiduciary Investment Trust and are not representative of an individual account objective. The median targets are considered as base guidelines, and as such, there is no guarantee of complete adherence to these levels. • While diversification through an asset allocation strategy is a useful technique that can help to manage overall portfolio risk and volatility, there is no certainty or assurance that a diversified portfolio will enhance overall return or outperform one that is not diversified. Please note that the use of asset allocation or diversification does not assure a profit or guarantee against a loss. • Fees are associated with managed portfolios. A written fee disclosure is available from your investment professional at Qualified Plan Advisors. • **Mutual Funds are sold by prospectus. To obtain a copy of the prospectus, the participant should contact the plan's investment advisor or the mutual fund company directly. Before investing, carefully consider the fund's investment objectives, risks, charges, and expenses. The underlying fund prospectuses contain this and other important information. Read the prospectuses carefully before investing.** • Qualified Plan Advisors (QPA)/ Lawing Financial, Inc. is not an affiliate of McCready and Keene, Inc. and is not a OneAmerica company. • Provided content is for overview and informational purposes only and is not intended and should not be relied upon as individualized tax, legal, fiduciary, or investment advice.