

## Lesson 5

### Questionnaire

---





**Complete this questionnaire honestly – do not consider the points until the end!**

1. If you had \$1,000 to invest, what would you do with it?
  - a) Keep it in a savings account or GIC – **1 point**
  - b) Ask a professional to invest it for me – **2 points**
  - c) Buy a mix of stocks and ETFs – **3 points**
  - d) Go all-in on high-growth stocks or crypto – **4 points**
2. Do you prefer to manage your own investments?
  - a) No, I'd rather leave it to experts – **1 point**
  - b) I want to have some say, but not do everything myself – **2 points**
  - c) Yes, I enjoy being hands-on – **3 points**
  - d) I want full control and to take risks – **4 points**
3. How would you feel if your investment dropped 10% in one month?
  - a) I'd panic and pull my money out – **1 point**
  - b) I'd feel uncomfortable but stay in – **2 points**
  - c) I'd be fine and ride it out – **3 points**
  - d) I'd see it as an opportunity to buy more – **4 points**
4. What's your ideal investment timeline?
  - a) Under 1 year – **1 point**
  - b) 1–5 years – **2 points**
  - c) 5–10 years – **3 points**
  - d) 10+ years – **4 points**
5. How much time do you want to spend learning about investing?
  - a) Very little – I just want it done for me – **1 point**
  - b) Some – I want to understand the basics – **2 points**
  - c) I enjoy learning and tracking the market – **3 points**
  - d) I love it and spend time researching – **4 points**

**Total up all your points and review the scoring guide below to see your suggested investment vehicle and investor type!**

## Lesson 5

### Scoring guide:

Total score	Investor type	Suggested investment vehicle
5-7	 Conservative	Segregated funds, GICs or conservative mutual funds
8-11	 Guided	Balanced mutual funds, managed ETFs or robo-advisors
12-16	 Informed DIY	ETFs, individual stocks and bonds, direct investing with guidance
17-20	 Aggressive DIY	Stocks, real estate, hedge funds, high-growth or alternative assets

### Reflection exit ticket: At the end of this lesson, complete the following questions in full sentences!

1. What is one thing I now understand about investment vehicles after this lesson?
  
2. What is one thing I want to learn more about or still find confusing when it comes to investment vehicles?
  
3. Now that you know your investor type, pay attention during today's video to see which investment vehicles match your profile. Would you still choose the same approach, or has your thinking changed?