



Guide to Portfolio Selection

When you answer these easy questions about your investment experience, suitability, risk tolerance and more, we'll match you with the portfolio that's right for you.

Please fill out one GPS for EACH ACCOUNT you are opening.

1. Tell us how much experience you have as an investor:

- a. None: I have never opened an investment account before. (0 points)
- b. Limited: I own or have owned stocks, bonds and/or mutual funds. (1 point)
- c. Some: I understand the concept of diversification and am familiar with the many varied asset classes. (3 points)
- d. Substantial: I have extensive knowledge about investing and the markets. (6 points)

Score

2. If an investment you owned declined 25% in a single month, how would you react?

- a. I would sell it to avoid further losses. (0 points)
- b. I would protect myself by selling some of it. (1 point)
- c. I understand that this can happen on occasion, so I would not sell. (2 points)
- d. I would consider the decline in price to be a great buying opportunity, so I'd buy more of this investment. (3 points)

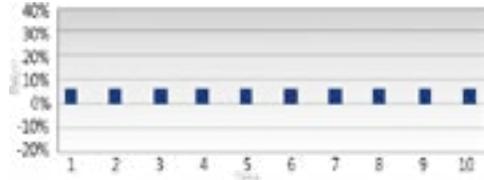
Score

3. Investment values fluctuate. The more they fluctuate, the more money you gain or lose. Select the illustration that best matches how much fluctuation you are willing to tolerate from your investment over time:

- a. Chart A (0 points)
- b. Chart B (2 points)
- c. Chart C (3 points)
- d. Chart D (4 points)
- e. Chart E (6 points)
- f. Chart F (7 points)

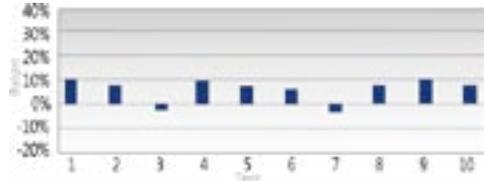
Score

A



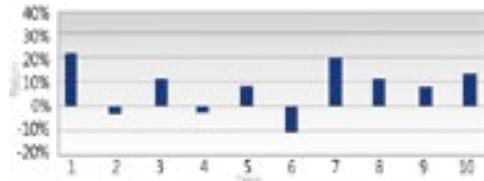
I am not willing to tolerate any market fluctuation.

B



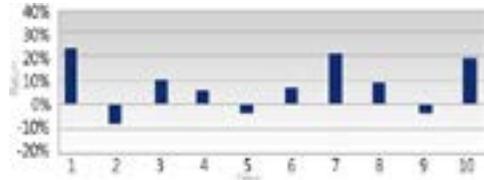
I want limited fluctuation, even if that means receiving lower returns.

C



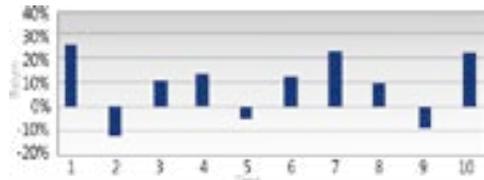
I am willing to tolerate some fluctuation and am content with earning modest returns.

D



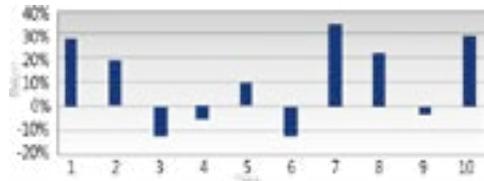
I am willing to experience a moderate amount of fluctuation in exchange for the opportunity to earn higher returns.

E



I am willing to experience a lot of fluctuation in exchange for the opportunity to earn higher returns.

F



I am willing to let my account values fluctuate significantly for the chance to earn the highest returns.

4. What is your age? (0 points)

5. What is your primary investment objective for your investments?

- a. Capital Preservation: You seek to preserve your capital and will accept lower returns in exchange for greater price stability. (1 point)
- b. Conservative Income: Your goal is to minimize the effect of market value fluctuations by taking an income-oriented approach with only limited potential for capital appreciation. (2 points)
- c. Growth and Income: You seek a modest increase in your investment through a combination of income and appreciation and are willing to tolerate some market fluctuation. (3 points)
- d. Moderate Growth: While income is somewhat important, you have a preference for growth and can withstand moderate market fluctuations in order to achieve it. (4 points)
- e. Growth: You have a preference for growth and can withstand significant market value fluctuations in order to achieve it. (6 points)
- f. Aggressive Growth: You seek aggressive growth and are willing to tolerate very wide market value fluctuations in order to achieve it (willing to lose more than 50%). (7 points)

Score

6. The Edelman Managed Asset Program® (EMAP) is a long-term investment. How long do you plan on keeping this account invested?

- a. I plan on keeping this investment less than 3 years. (1 point)
- b. I plan on keeping this investment between 3 years and 6 years. (2 points)
- c. I plan on keeping this investment more than 6 years. (4 points)

Score

Total Score

Find Your Portfolio

Apply your Total Score from the prior page to the charts below to find your suggested portfolio(s).

Risk Score	For accounts of \$3,000 to \$25,000	Risk Score	For accounts of \$25,000 to \$75,000	Risk Score	For accounts of \$75,000 to \$750,000	Risk Score	For accounts of \$750,000 and above
27	Mason - S Mason - LC	27	Decatur - S Decatur - LC	27	Revere - S Revere - LC	27	Boone - S Boone - LC
26		26		26			
25		25		25	Hancock - S/LC	25	Jay - S Jay - LC
24	Tarrant - S Tarrant - LC Tarrant - WD	24	Wilson - S Wilson - LC	24	Attucks - S/LC	24	Armistead - S Armistead - LC Armistead - WD Armistead - HC
23		23		23	Jefferson - S Jefferson - LC		
22		22		21	Franklin - S/LC/WD/ HC		
21		21		20	Washington - S Washington - LC Washington - WD Washington - HC		
20	20	19	19	Marshall - S Marshall - LC Marshall - WD Marshall - HC			
19	Monroe - S Monroe - LC Monroe - WD Monroe - HC	19	Forten - S Forten - LC			18	
18		18			17	Ross - S Ross - LC Ross - WD Ross - HC	
17		17	16	Madison - S Madison - LC Madison - WD Madison - HC			
16		16	15		15		
15	15	14	14		14	Hamilton - S Hamilton - LC Hamilton - WD Hamilton - HC	
14	Ludington - S Ludington - WD Ludington - HC	14	Haynes - S Haynes - LC Haynes - WD Haynes - HC	13	13		
13		13		12	Adams - S Adams - LC Adams - WD Adams - HC		
12		12		11		11	Knox - S Knox - LC Knox - WD Knox - HC
11		11		10	Jones - S Jones - WD Jones - HC	10	
10	Champe - S Champe - WD Champe - HC	9	Wheatley - S Wheatley - WD Wheatley - HC	9		Morris - S/WD/HC	9
9		8		8	8	Sevier - S Sevier - LC Sevier - WD Sevier - HC	
8		7		7	7		7
7		6		6	6	6	
6	Warren - S Warren - WD Warren - HC	5	Mazzei - S Mazzei - WD Mazzei - HC	5	Lafayette - S Lafayette - WD Lafayette - HC	5	Penn - S Penn - WD Penn - HC
5		4		4		4	
4		3		3		3	
3	3	2	McCauley - S McCauley - WD McCauley - HC	2		2	
2	2	1		1			
1	1	1	1	1			

Select Your Cash Position	S - Standard <i>For general use, where withdrawals or deposits are minimal</i>	LC - Low Cash <i>For clients with ample cash elsewhere and for accounts receiving regular deposits</i>	WD - Withdrawal <i>For accounts with annual withdrawals of 6-12%</i>	HC - High Cash <i>For accounts with annual withdrawals of more than 12%</i>
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Indicate Your Portfolio Selection Here

Complete the chart below to indicate the portfolio you have selected for your new EMAP account.

Account	Account Name	Approx. Account Value	Portfolio Selected
Example	Joe Smith Rollover IRA	\$120,000	Franklin - LC
Registration			

DD/MM/YYYY _____ Signature of Owner	Date	DD/MM/YYYY _____ Signature of Advisor	Date
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DD/MM/YYYY _____ Signature of Owner	Date	DD/MM/YYYY _____ Signature of Advisor	Date
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