**RISK TOLERANCE ASSIGNMENT**

Ben is a 30 year old. He and his girlfriend live together. They do not have any children.

Ben is a partner in the family business. He lives in an older farmhouse that is owned by the business, so has no mortgage or rent payments. He is responsible for all of the bills and upkeep of the farmhouse, which is over 100 years old. When more than 2 appliances are on at once, the breaker often goes. Ben drives an older pickup truck that requires repairs often.

Ben is paid bi-monthly, and his annual salary is $36,000. As the business grows, his annual salary increases, but he does not receive bonuses; instead, the money is reinvested in the business. The business does not have a retirement plan. Ben has a few thousand dollars saved that he feels he could stand to lose.

In his spare time, Ben likes to ski, preferably on real mountains, camp and hike in out of the way places. He would like to put a pool in at the farmhouse sometime.

**Early Career (up to mid-30s)**

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| --- | --- |
| **Established**  Your name and status (employed, married, or single, etc.) |  |
| Goals and investments (e.g., save for a holiday, etc.) |  |
| Concerns |  |
| Advice on Risk Tolerance |  |

Use the back if you need more space.