**Advanced Money School Lesson 5 Worksheet: Your Investment Style**

Please rate how much you agreed with the following statements where 1 = “Not at all” and 5 = “Very much”.

1. I am knowledgeable about the stock market and comfortable researching and choosing investments.

2. I am interested in learning more about investing and the stock market.

3. I’m happy to devote some of my time to learning about investing and managing my own investments.

4. I understand that investing is risky and the stock market is volatile. I still think stocks are one of the best places to invest for long-term growth.

5. I like knowing exactly what I’m investing in, even if that means taking on more risk.

6. I hate to pay an expert for something I can learn to do myself. (Even if I admit I won't do quite as good a job as a professional.)

Add up your total score.

**20 or higher.** Construct a portfolio consisting of low-cost index funds, some stocks, and alternative investments.

**Between 13 and 20.** Choose either actively-managed mutual funds (such as target date funds) or a roboadvisor.

**12 or below.** Stick with a roboadvisor. Or, consider hiring a financial advisor to help you navigate investment decisions.