

Score Card—continued

Line up Quiz page here 

INSTRUCTIONS:
For each check mark, place the corresponding score point value in the “Your Score” column.

		Score	Your Score
5. Have you ever hired an investment professional because your friend, relative, co-worker or neighbor recommended it? Check “yes” or “no”.	✓		
Yes		1	
No		0	
6. Are you signed up for the Do Not Call list?			
Yes		0	
No		1	
7. Have you attended an investment seminar with a free meal (not including this event)?			
Yes		1	
No		0	
8. The statements below might describe potential investment opportunities. Read each statement and indicate how interested you would be in the investment on a scale of 1 to 7, where 1 = “Not at all interested” and 7 = “Extremely interested.”	1-7		
“There is no way to lose on this investment—it is fully guaranteed.”		1-4 = 0 5-7 = 1	
“I am a licensed broker through the SEC.”		1-7 = 0	
“This is an opportunity to get in on the ground floor of a company that is about to roll out a revolutionary new technology.”		1-4 = 0 5-7 = 1	
“The lowest return you could possibly get on this investment is 50% annually, but most investors are making upwards of 110% a year.”		1-4 = 0 5-7 = 1	
“This investment product is registered with the SEC and your state securities agency.”		1-7 = 0	
“This stock has outperformed the Dow Jones Industrial Average each year for the last five years.”		1-7 = 0	
“This investment is for a company with excellent management and in a high growth industry.”		1-7 = 0	
“This investment made hundreds of people extremely wealthy.”		1-4 = 0 5-7 = 1	

**PLACE YOUR
QUIZ HERE
TO SCORE**

How did you do? Check your score:

- 0 to 3 points – Green Zone:** You share few behaviors with investment fraud victims
- 4 to 6 points – Yellow Zone:** Be careful
- 6 points or more – Red Zone:** Learn more at SaveAndInvest.org

(SUBTOTAL)

(SUBTOTAL)
FROM PREVIOUS
PAGE

TOTAL

 Check Your Score