

Investment Forum 2025 Member Survey

Please answer all the questions in the survey to the best of your ability.

About You

1. How many years have you been a member of OLLI? [Textbox] *

2. How many years have you been a member of the Investment Forum? [Textbox] *

3. How many years have you been retired? [Textbox] *

4. How many years have you been an investor? [Textbox] *

5. Do you have a brokerage account?[Multiple Choice] *

☐ Yes

☐ No

6. Do you trade primarily on-line?[Multiple Choice] *

☐ Yes

☐ No

7. What percentage of your living expenses are funded by your investments? Include income from investments, withdrawals of investment principal, and IRA distributions that you spend [Textbox] *

About your Portfolio and Allocations

8. What percentage of your investments are in the following categories? (must add up to 100%) [Constant Sum] *

Taxable Investment Account	_____
Regular IRA	_____
Roth IRA	_____
Annuities	_____
529 (college savings)	_____
Bank products (savings, CDs, money market funds)	_____
Charitable trust	_____
Commodities (direct or via fund)	_____
Crypto (direct or via fund)	_____
Other	_____

Tip: Please enter a number, the total of all items must equal 100

9. What percentage of your investments are invested in the following categories? (must add up to 100%) [Constant Sum] *

Funds of all types (mutual funds,	_____
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ETFs, Closed-end funds)	
Individual investments (stocks, bonds, annuities, real estate, commodities, etc.)	_____

Tip: Please enter a number, the total of all items must equal 100

10.

Of your investments in funds of all types, what percentage are in the following types of funds? (must add up to 100%)

[Constant Sum] *

Managed funds	_____
Index funds	_____

Tip: Please enter a number, the total of all items must equal 100

11. Of your total portfolio, what percentage is in each type of investment (individual investments or in funds)? (must add up to 100%) [Constant Sum] *

Stocks	_____
Bonds	_____
Other fixed income investments	_____
Master Limited Partnerships	_____
Real estate (direct or through REITs)	_____

Certificates of Deposit	_____
Money Market funds or cash	_____
Commodities (including gold)	_____
Annuities	_____
Crypto	_____
Private Equity	_____
Other (please name below)	_____

Tip: Please enter a number, the total of all items must equal 100

12. If you specified "Other" in the previous question, what type of investment does that refer to? [Textbox]

13. What percentage of your portfolio is invested in foreign stocks, bonds and currencies? [Textbox] *

14. Do you invest in: (check all that apply)? [Checkboxes] *

- ☐ Options or futures
- ☐ Hedge funds
- ☐ Leveraged or inverse funds or investments
- ☐ "Penny" stocks
- ☐ Junk bonds
- ☐ Private Equity
- ☐ Crypto
- ☐ Other _____
- ☐ None

15. Do you have targeted investments allocation for stocks (growth, value, large, mid, and small cap), fixed income, cash, and do you rebalance at least annually to maintain your allocation?[Multiple Choice] *

- ☐ Yes
- ☐ No

16. Do you have a "sandbox" (a small allocation of your portfolio that you use for speculative, high risk, or unusual investments)?[Multiple Choice] *

- ☐ Yes
- ☐ No

About your Risk Tolerance and Investment Objectives

17. Do you consider yourself a [Multiple Choice] *

- ☐ growth investor
- ☐ value investor
- ☐ income investor
- ☐ momentum investor
- ☐ mix of several strategies

18. What is your risk tolerance?[Multiple Choice] *

- ☐ Conservative
- ☐ Moderate
- ☐ Aggressive
- ☐ Very aggressive

19. How long do you typically hold investments?[Multiple Choice] *

- ☐ Less than one month
- ☐ 1-6 months
- ☐ 6 months to 2 years
- ☐ 2-5 years
- ☐ Over 5 years

20. What primarily drives your sell decisions?[Multiple Choice] *

- ☐ Predetermined profit targets
- ☐ Stop loss levels
- ☐ Fundamental changes in the company or the economy
- ☐ Technical indicators
- ☐ Need for cash or rebalancing
- ☐ Poor investment performance
- ☐ Gut feeling/intuition
- ☐ Rarely sell -- buy and hold

21. How do you handle market volatility?[Multiple Choice] *

- ☐ Stay calm and stick to my plan
- ☐ See it as buying opportunities
- ☐ Reduce positions and rebalance

**22. What are the important lessons you have learned during your time in the market?
(Pick all that apply) [Checkboxes] ***

- ☐ Don't try to time the market
- ☐ Diversification is crucial
- ☐ Do your own research
- ☐ Cut losses quickly
- ☐ Stay in the market even during downturns
- ☐ Avoid emotions. Stick with strategy and process

**23. How has your investment approach changed over time? (Pick all that apply)
[Checkboxes] ***

- ☐ Became more conservative
- ☐ Became more aggressive
- ☐ Shifted from passive to active
- ☐ Shifted from active to passive
- ☐ Became more diversified
- ☐ Focused more on specific sectors
- ☐ Has not changed much

24. What best describes your investment goals for your income?[Multiple Choice] *

- ☐ Enough to live on or cover living expenses
- ☐ Generate income to make additional investments

25. What best describes your investment goals for your portfolio?[Multiple Choice] *

- ☐ Preserve capital
- ☐ Last my lifetime
- ☐ Grow with inflation or the market
- ☐ "Beat the market"
- ☐ Create a legacy/inheritance
- ☐ Fund some purpose (education, home, business) for family or heirs

26. Do you regularly measure the performance of your investments against some index?[Multiple Choice] *

- ☐ Yes
- ☐ No

Investment Decisions

27. How many hours per week do you spend following the markets, searching for and analyzing investment opportunities? [Textbox] *

28. On average, how many trades (buying or selling investments) do you make per month? [Textbox] *

**29. What financial publications to you read regularly? (check all that apply)
[Checkboxes] ***

- ☐ Wall Street Journal
- ☐ Barron's
- ☐ Kiplingers
- ☐ Forbes
- ☐ Investor's Business Daily
- ☐ Other1 _____
- ☐ Other2 _____

30.

**Which of the following advisory services and investment websites do you use?
(check all that apply)**

[Checkboxes] *

- ☐ Morningstar
- ☐ Morningstar sector newsletters
- ☐ Seeking Alpha
- ☐ Yahoo Finance
- ☐ Bloomberg
- ☐ Value Line
- ☐ Motley Fool
- ☐ Broker website
- ☐ Other1 _____
- ☐ Other2 _____
- ☐ None of the above

31. Which best describes you?[Multiple Choice] *

- ☐ I do my own research and make my own investment decisions
- ☐ I make my own decisions, but I seek advice from an Account Executive, investment service, or other "expert"
- ☐ Some or all of my portfolio is managed by an Investment Advisor with discretionary investment authority

32. Do you expect to hire a financial advisor or robo portfolio management service in the next five years to manage or all some of your investments?[Multiple Choice] *

- ☐ Yes
- ☐ No

33. Do you have long-term care insurance?[Multiple Choice] *

- ☐ Yes
- ☐ No

34.

Please list any topics that you would like to see discussed. List as many as you want in as much detail as you care to write. Also, comments on the existing Forum format, and things that may make the Forum more useful for your needs.

[Textbox]