

# Submit risk profile questionnaire



# Go to My Profile

ZURICH 蘇黎世

[My Profile](#) [Contact Us](#) [Notifications](#)

**In force**  
**Magnitude**  
Policy no. : [REDACTED]

Policyholder	Life insured	Risk appetite	Eligibility for derivative funds	Expiry date
[REDACTED]	[REDACTED]	1	No	Aug 15, 2024

1

Go to 'My profile'



## My profile

Contact Information

Name [REDACTED] Email address [REDACTED]

[Edit email address](#)

Mobile phone no.: [REDACTED] Residential no. [REDACTED]

Office no. [REDACTED]

[Edit phone number](#)

[Risk Profile](#)

Account Information

User ID [REDACTED]

[Change user ID](#)

[Change Password](#)

2

Click 'Risk Profile'

# Submit risk profile questionnaire



**Risk profile**

Policyholder : ██████████

**3** Click here to submit a new risk profile questionnaire

[+ Submit risk profile questionnaire](#)

Submission date <sup>1</sup>	Risk appetite	Submission method	Type
Aug 16, 2023 16:50:53	1	Online	Servicing >
Aug 10, 2023 00:00:00	5	Online	New application >

**Remark**

1. For those risk profile questionnaire submitted by post/ in person , this submission date is the date Zurich received the questionnaire for processing.

You can view your previously submitted risk profile questionnaire here.

# Answer all the questions in the questionnaire

## Section A: Basic information and investment risk

1. What is your age?

- > 65
- 51 – 65
- 36 – 50
- 18 – 35

2. How many years of investment experience do you have? Investment experience includes but not limited to Mandatory Provident Fund (MPF), mutual funds investment and stock trading experience.

- NIL
- 1 – 3 year(s)
- 4 – 6 years
- 7 – 10 years
- > 10 years

3. What percentage of your income is available for investment now?

- < 10%
- 10% – 15%
- 16% – 25%
- > 25%

Next

## Section B: Investment knowledge and experience

1. Do you have any knowledge in derivatives based on education or working experience acquired from education institutions (e.g. colleges, universities, vocational institutions, etc.), professional organizations, banks, financial institutions or other organizations?

- Yes
- No

2. Do you have any prior investment experience in derivatives (e.g., principal protected structured products, equity/interest rate/foreign exchange-linked structured products, currency linked deposits, options, futures, warrants, callable bull bear contracts, share margin or foreign exchange margin, etc.) and fully understand the underlying risks of such investments?

- Yes
- No

Back

Next



## Section C: Declaration

I hereby declare that I acknowledge, understand and agree as follows:

1. The information provided by me in this questionnaire is up-to-date, true and accurate to the best of my knowledge. I understand my failure to provide up-to-date, true and accurate information may affect any suitability assessment conducted by Zurich.
2. Investments involve risks and that past performance is not indicative of future result, prices can go up and down.
3. This questionnaire only serves as a reference when determining my risk profile, and the result indicated herein does not constitute offer or solicitation to buy or sell or recommendation of any product and should not be considered as investment advice.
4. This questionnaire is valid for 12 months from the date on which it is signed. I undertake to advise Zurich or the licensed insurance intermediary of any material change in circumstances which would affect my risk profile, and to re-perform this questionnaire as soon as possible if there is any such change.

Your risk appetite and/or your suitability to select the investment choices of the corresponding underlying investment with derivative exposure will be updated, if required, as soon as practicable after we receive the completed and duly signed risk profile questionnaire from you to all of your policies issued by Zurich, upon our acceptance. Your investment on investment choices by way of switching-in, redirection of regular premium and top-up premium will be subject to the latest results on the risk profile questionnaire, which should be valid for one (1) year.

You are not allowed to opt out or deviate in any respect from the process of completing this risk profile questionnaire. Zurich is required not to accept the application if you choose to opt out or deviate from the process of completing this risk profile questionnaire.

Submit

5

Click 'Submit' after reviewing your answers

4

Answer all the questions in section (A) and (B)

All set!

Submit risk profile questionnaire

✓  
Input

✓  
Review

3  
End

**Your request has been submitted successfully.**

Your current risk appetite is :

3

Done