

# Investment Portfolios

## Conservative Income Portfolio

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**Investment Objective:** Providing an immediate and stable source of income along with potential for modest long-term capital growth.

**Target Audience:** Investors seeking a stable and consistent source of income due to change in employment and/or lifestyle.

**Recommended Time Horizon:** Medium-term

**Risk Tolerance:** Low



## Which customer matches the profile of a customer that would benefit from a Conservative Income Portfolio?

Select the customers that matches the Conservative Income Portfolio profile

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### Jennifer

**Timeline:** 5 years

**Investment Goals:** saving for a downpayment for a new home

**Risk Tolerance:** not comfortable with wild market swings; would prefer stability



### Thomas

**Timeline:** 25 years

**Investment Goals:** Seeking longer-term growth for future retirement goals

**Risk Tolerance:** comfortable with market swings and cycles



### Mohammed

**Timeline:** 15 years

**Investment Goals:** saving for his only daughter's education fund

**Risk Tolerance:** comfortable with potential losses in exchange for larger returns



### Sarah

**Timeline:** 5 years

**Investment Goals:** saving for a 6-month trip around the world

**Risk Tolerance:** high - willing to deal with fluctuations for the possibility of higher returns



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## Summary

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