

INVESTOR PROFILE QUESTIONNAIRE

For use with Pacific Funds/Pacific Funds 529 College Savings Plan

Please take a few minutes to carefully answer the following questions. Your investment profile, based on your responses below, will be matched to a Portfolio Optimization Fund.

Name _____
(First, Middle Initial, Last)

Address _____

City _____

State _____ Zip Code _____

Daytime Phone (_____) _____

Occupation _____

1. What is your primary purpose for investing?

- a. retirement
- b. education
- c. charitable giving or estate planning
- d. other _____

2. What investments do you currently have (in dollars)?

savings \$ _____ stocks \$ _____
bonds \$ _____ mutual funds \$ _____
certificate of deposit \$ _____ other \$ _____

3. When do you plan to start withdrawing money from your mutual fund?

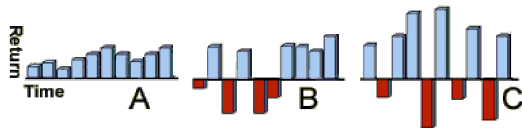
- a. within 5 years
- b. in 5–10 years
- c. in 10–15 years
- d. in more than 15 years

4. What percentage of your total personal wealth is accounted for by a small business (less than \$10 million in revenue) that you own and operate?

- a. zero percent
- b. less than 25 percent
- c. 25–49 percent
- d. 50–75 percent
- e. over 75 percent

5. The graphs below represent three different ways in which your money can be invested. The graphs show hypothetical returns from year to year. Which would you have chosen?

- Investment A Investment B Investment C



6. If the value of your investment decreased by 20 percent in one year, how would you react?

- a. I would be very concerned, and I would find another way to invest my money.
- b. I would be somewhat concerned, and I would reconsider the aggressiveness of my investment portfolio.
- c. I would not be concerned about the temporary fluctuation in my investment.

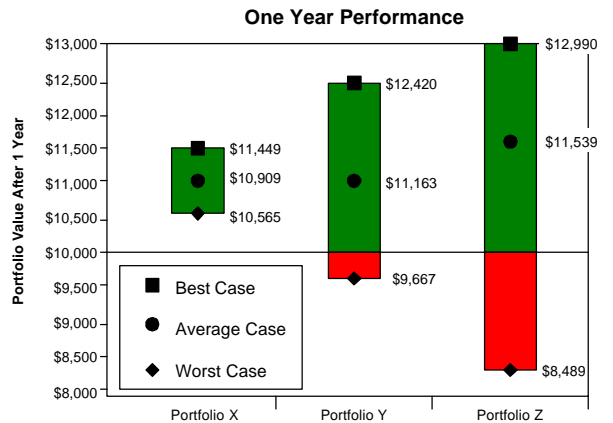
7. If the stock market increased by 15 percent while the value of your investment portfolio, which is composed primarily of bonds and cash, increased by 4 percent in one year, what would be your reaction?

- a. I would replace the bond and cash portions of my investment portfolio with stocks.
- b. I would add more stocks to my investment portfolio but stocks would not make up the majority.
- c. I would not change my investment portfolio.

8. The graph below shows the possible outcomes (best, average, and worst case) of \$10,000 invested in three different investment portfolios over the span of one year. Select the one that best matches how you would have invested the money.

Performance below is hypothetical and is not indicative of any Portfolio Optimization Funds results.

- Portfolio X Portfolio Y Portfolio Z



This material must be preceded or accompanied by a prospectus with more complete information about Pacific Funds, including fund investment objectives, risks, charges, limitations and expenses. Read them carefully before investing or sending money. Share values will fluctuate and when redeemed may be worth more or less than the original cost. Neither the program nor the principal nor the investment return is guaranteed or insured by the state of Arizona or Montana, by Pacific Funds or by Pacific Life.

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