

Using Synaptic Attitude to Risk Questionnaire

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When a new client is set up in the client module, you can click on the 'Edit' button alongside 'Attitude to Risk' to access the questionnaire.

The screenshot shows the Synaptic client management interface. On the left, a sidebar lists various client details categories: Personal Details, Holdings, Income Sources, Accumulation Goals, and Retirement Income Goals. The main area displays the 'Personal Details' form for a client named 'Example Test'. The form includes fields for Title (Mr), Name (Example Test), Address (Test Road), Postcode (AAA 123), Date of Birth (01/11/1980), Sex (Male), Smoker (No), Occupation (Baker), Home, Office, Mobile, Email, Salary £, Service Level (Platinum), and Attitude to Risk (Balanced). Below the Attitude to Risk field are 'Edit...' and 'Report' buttons. A callout box points to the 'Report' button with the text: "If you already have completed a questionnaire for the client, you can access the report". To the right of the form, a preview of the 'CAPITA' questionnaire is visible, showing a list of statements and response options.

You also have the option to run a new questionnaire by selecting 'change'.

The screenshot shows the Synaptic client management interface after a client has been saved. A green notification bar at the top says "Client saved". The 'Personal Details' form is visible, and the 'Attitude to Risk' field is set to 'Balanced'. A dialog box titled 'Client Attitude to Risk' is open, displaying the questionnaire results. The dialog box includes the following information: "Attitude to Risk: Balanced", "Description: Balanced investors do not particularly regard themselves as cautious people and have no strong positive or negative associations with the notion of taking risk. They will typically have some experience of investment and a degree of understanding of investment matters. They will usually make investment decisions reasonably quickly and don't tend to be particularly anxious about investment decisions they have made. They can be inclined to look for safer investments rather than higher returns, but understand that investment risk may be required to meet their investment goals. While they will take investment risk, they are still not particularly comfortable with investing in the stockmarket and get more comfort from bank deposits than riskier investments.", "Last Updated: 23/11/2017", and "Override reason: test". At the bottom of the dialog box are three buttons: 'Generate Report', 'Change', and 'Close'.

The Attitude to Risk Questionnaire is easy to use, with the client's replies captured by

drop down.

Set Risk Manually <input type="checkbox"/>			
	People who know me would describe me as a cautious person.	Not yet answered	*
Cautious	I feel comfortable about investing in the stockmarket.	Not yet answered	*
	I generally look for safer investments, even if that means lower returns.	Not yet answered	*
	Usually it takes me a long time to make up my mind on investment matters.	Not yet answered	*
	I associate the word "risk" with the idea of "opportunity".	Not yet answered	*
	I generally prefer bank deposits to riskier investments.	Not yet answered	*
	I find investment matters easy to understand.	Not yet answered	*
	I am willing to take substantial investment risk to earn substantial returns.	Not yet answered	*
	I've little experience of investing in stocks and shares.	Not yet answered	*
	I tend to be anxious about the investment decisions I've made.	Not yet answered	*
	I'd rather take my chances with higher risk investments than increase the amount I'm saving.	Not yet answered	*
	I'm concerned by the volatility of stockmarket investments.	Not yet answered	*