Using Synaptic Attitude to Risk Questionnaire

Last Modified on 23/11/2017 4:08 pm GMT

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.

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2	Example Test 🛨 👻							actions.	
5,	Add new client 🕞 Save	🖉 Cancel 🔀 D	elete				Precision 1 per	ellor ple vho krow me workd describe me as a sadiocoperson. a speterizaño ateur investeg en ha doctevan el, neraly loci for saller investments, eren ifittar moas lover eforma	Armoni No Strong Opinion Agree No Strong Opinion
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8	Accumulation Goals	Postcode	AAA 123					ngelane provinsioni, our agrier nouring, i maar ensi an negatig fanne, is a natifiade to ital vers aet ar OS August 2013.	
10	Retirement Income Goals	Date of Birth	01/11/1980	0	12 •				
		Sex	Male	O Female					
		Smoker	() Yes	No					
		Occupation	Baker		0,				
		Home					0w	hel het bland Ghendig Verk Annalisieg of Anna Persong Hillions (2) Rowardser (201)	Rep-2:47
		Office							
		Mobile						If you already	have
		Email							inare
		Salary £						completed a	
		Service Level	Platinum		-			questionnaire	for the
		Attitude to			-			client, you can	access
		Risk	Balanced		Edit R	eport		the report	
		External identifier						l	

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

Client	Risk Rating Mode	ller Analyser C	omparator Webline Product & Fund Tools & Calculators 🔻 Settings 🔫	Example Test 🕶	? Help 👻		
Q,			8	G	SYNAPTIC		
2 :							
-	Add new client 🔒 Save 🖉 Cancel 😣 Delete						
(j)	Personal Details	 Client save 	d				
		Title	Mr 🔹				
-	Holdings	Name	Client Attitude to Risk				
â	Income Sources	Address	Attitude to Risk: Balanced Description:				
ß	Accumulation Goals		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 tayloizally have some experience of investment and a degree of understanding of mitement nates. They will subally make investment decisions reasonably quickly and don't tend to be particularly ankous about investment decisions they have made. Investment risk may be required to meet their investment gask. While they will take investment risk, they are still not particularly confortable with investing in the stockmarket and get more comfort from bank deposits than risk investment risk.				
ß	Retirement Income Goals	Postcode					
		Date of Birth	Last Updated:				
		Sex	23/11/2017				
		Smoker	Override reason:				
		Occupation					
		Home					
		Office	Generate Report Change Close				
		Mobile					
		Email					
		Salary £					
		Service Level	Platinum 👻				
		Attitude to Risk	Balanced Edit., Report				

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

drop down.

Set Risk Manually	People who know me would describe me as a cautious person.	Not yet answered 🔹 *
ſ	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 🔹 🔹
Cautious	I find investment matters easy to understand.	Not yet answered 👻 *
Cautious	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 👻 *