

Risk Rated Holdings within the Client Module

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We have introduced the ability to risk rate your client's holdings within the Synaptic Suite.

When within the Holding screen, you can select the button 'Risk Rate Holdings'. This will work through all your client holdings to calculate the risk rating.

Note - This will only be successful on holdings with a 100% asset allocation

The screenshot shows the Synaptic Suite interface for a client named Nick Calvert. The top navigation bar includes 'Clients', 'Risk Rating', 'Modeller', 'Analyser', 'Comparator', 'Webline', 'Product & Fund', and 'Tools'. A search bar for clients is visible. The left sidebar contains 'Personal Details', 'Holdings', 'Income Sources', and 'Accumulation Goals'. The main content area shows a navigation bar with 'Policy Report', 'Start Contract Enquiry', and 'Risk Rate Holdings' (highlighted in red). Below this, there are sections for 'Platforms (0)' and 'SIPPs (0)', each with a table header containing 'Name', 'Provider', and 'Product'.

The screenshot shows the Synaptic Suite interface after the 'Risk Rate Holdings' action. The top navigation bar includes 'Clients', 'Risk Rating', 'Modeller', 'Analyser', 'Comparator', 'Webline', 'Product & Fund', 'Tools & Calculators', and 'Settings'. A search bar for clients is visible. The left sidebar contains 'Personal Details', 'Holdings', 'Income Sources', and 'Accumulation Goals'. The main content area shows a navigation bar with 'Policy Report', 'Start Contract Enquiry', and 'Risk Rate Holdings'. A green confirmation message is displayed: '✓ Risk rating of all eligible holdings was last performed on 19 March 2020 at 14:11'. Below this, there are sections for 'Platforms (0)' and 'SIPPs (0)', each with a table header containing 'Name', 'Provider', 'Product', and 'St'.

The risk rating can be found under the 'Synaptic Risk Rating' column:

✓ Risk rating of all eligible holdings was last performed on 19 March 2020 at 14:11

▼ Platforms (0)

Name	Provider	Product	Status	Synaptic Risk Rating	Value	Assigned To	Add
							Total value of Platforms £0.00

▼ SIPPs (0)

Name	Provider	Product	Status	Synaptic Risk Rating	Value	Assigned To	Add
							Total value of SIPPs £0.00

▼ Plans (2)

Name	Provider	Product	Status	Synaptic Risk Rating	Value	Assigned To	Add
Aviva Pension	Aviva Life & Pensions UK Limited	Personal Pension	In Force	Adventurous Plus (Rated on 19 March 2020 at 14:11)	£128,865.00		📄 📄 🗑️
Friends Life Personal Pension	Friends Life	The Personal Range - Individual Personal Pension	In Force	5.0 Adventurous (Rated on 19 March 2020 at 14:11)	£37,570.00		📄 📄 🗑️
							Total value of Plans £166,435.00

▼ Assets (0)

When risk rating Platforms & SIPPs, it will risk rate at individual Plan, Account & Asset levels as well as at Platform/SIPP level.

▼ SIPPs (1)

Name	Provider	Product	Status	Synaptic Risk Rating
SIPP 1			In Force	2.7 Moderately Cautious (Rated on 12 March 2020 at 10:36)

▶ Assets (0)

▶ Accounts (0)

▼ Plans (2)

Name	Provider	Product	Status	Synaptic Risk Rating
Plan 2			In Force	2.6 Moderately Cautious (Rated on 12 March 2020 at 10:36)
Plan 3			In Force	5.4 Adventurous (Rated on 12 March 2020 at 10:36)

Holdings can be risk rated as many times as you would like throughout the day.