

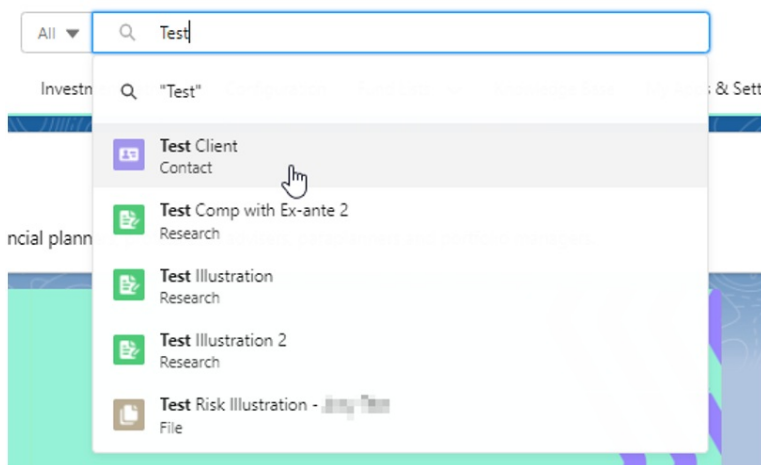
Creating a new Attitude to Risk Questionnaire

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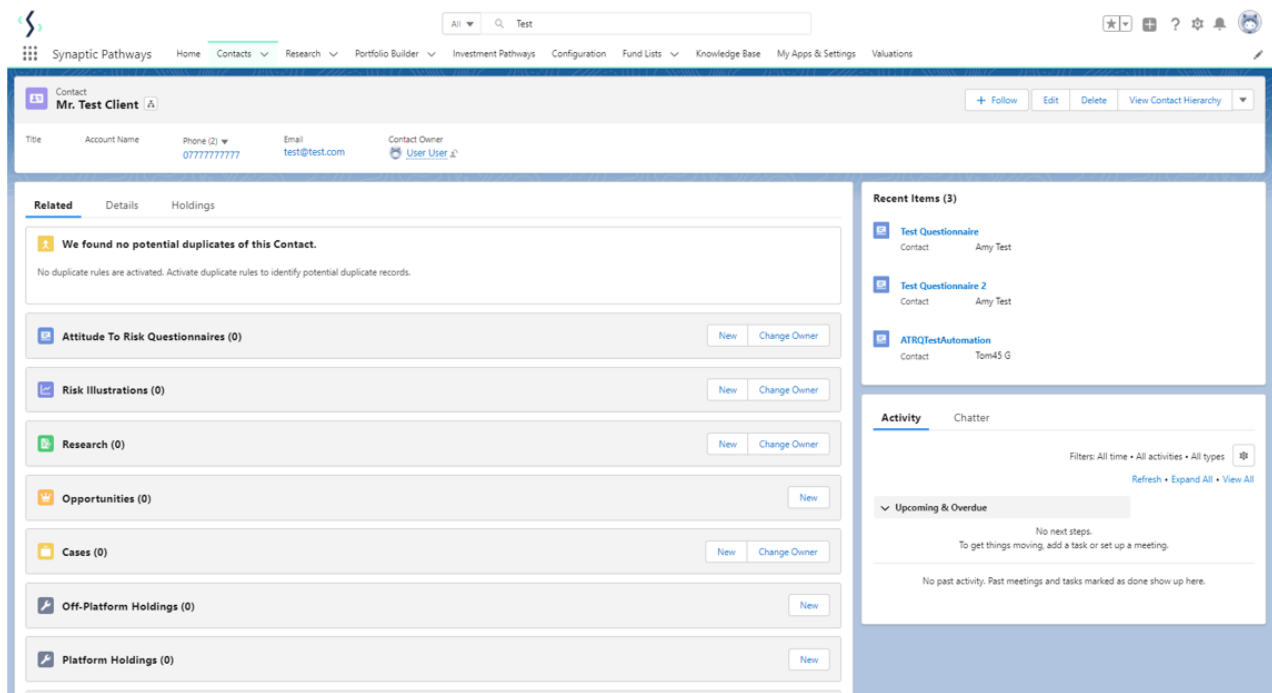
You can create an attitude to risk questionnaire in two ways, either by completing the questions on behalf of your client, or sending them the questionnaire by email to complete themselves.

To create an attitude to risk questionnaire, create a new contact or find an existing contact record.

In this example, I will search for a contact called 'Test Client 1':



This will load up their contact record:



To create an attitude to risk questionnaire, click 'New' next to 'Attitude To Risk Questionnaire'

Related Details Holdings

We found no potential duplicates of this Contact.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Attitude To Risk Questionnaires (0) New Change Owner

Risk Illustrations (0) New Change Owner

Research (0) New Change Owner

Enter the questionnaire name and click 'Save':

New Attitude To Risk Questionnaire

Information

* Risk Questionnaire Name Owner

User User

Cancel Save & New Save

✓ Attitude To Risk Questionnaire "ATR Questionnaire" was created. ✕

This will take you back to the contact record. To complete the questionnaire or send to a client to complete, click on the name of the questionnaire:

Attitude To Risk Questionnaires (1) New Change Owner

1 Item • Sorted by Default • Updated a few seconds ago

<input type="checkbox"/>	Risk Questionnaire	ATR Questionnaire	Contact?	Risk Categ...	Risk Rating	Default ↑
1	<input type="checkbox"/>	ATR Questionnaire				

Contact
Test Client

Once within the questionnaire, you get a choice of sending the questionnaire to your client to complete, or complete the questions on behalf of your client.

The screenshot shows the Synaptic Pathways ATR Questionnaire interface. At the top, there is a navigation bar with the Synaptic Pathways logo and a search bar containing 'All' and 'Test'. The main header includes 'Home', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', 'Valuations', and 'ATR Questionnaire'. The page title is 'Attitude To Risk Questionnaire' and 'ATR Questionnaire'. Below the title, there is a 'Contact' section with 'Test Client'. The main content area is titled 'Risk Questionnaire' and contains a list of 12 statements for the user to rate. The statements are:

1. People who know me would describe me as a cautious person.
2. I feel comfortable about investing in the stockmarket.
3. I generally look for safer investments, even if that means lower returns.
4. Usually it takes me a long time to make up my mind on investment decisions.
5. I associate the word "risk" with the idea of "opportunity".
6. I generally prefer bank deposits to riskier investments.
7. I find investment matters easy to understand.
8. I am willing to take substantial investment risk to earn substantial returns.
9. I've little or no experience of investing in stocks, shares, or investment funds.
10. I tend to be anxious about the investment decisions I've made.
11. I'd rather take my chances with higher risk investments than have to save more.
12. I'm not comfortable with the ups and downs of stockmarket investments.

At the bottom right of the questionnaire, there is a 'Risk Profile Category' and 'Risk Rating' section with a visual representation of a fish and a hook. The interface also includes buttons for 'Send to Client to Complete' and 'Complete Manually'.

The following articles cover how to complete the questionnaire manually and sending the questionnaire to a client:

[Creating an Attitude to Risk Questionnaire on behalf of your client](#)

[Sending an Attitude to Risk Questionnaire to your client to complete](#)