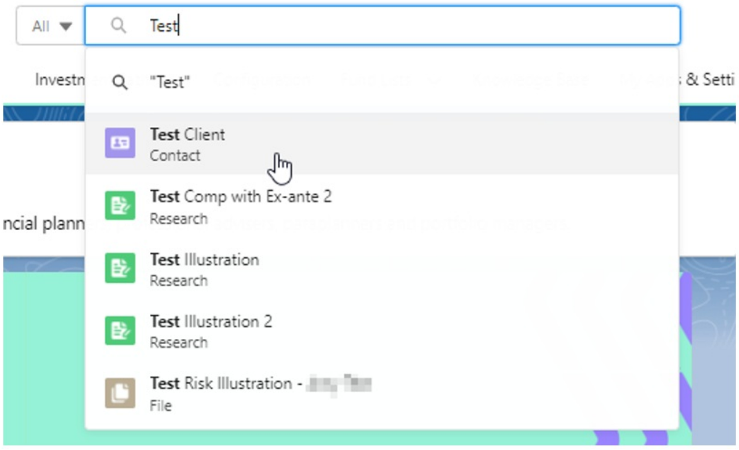
Sending an Attitude to Risk Questionnaire to your client to complete

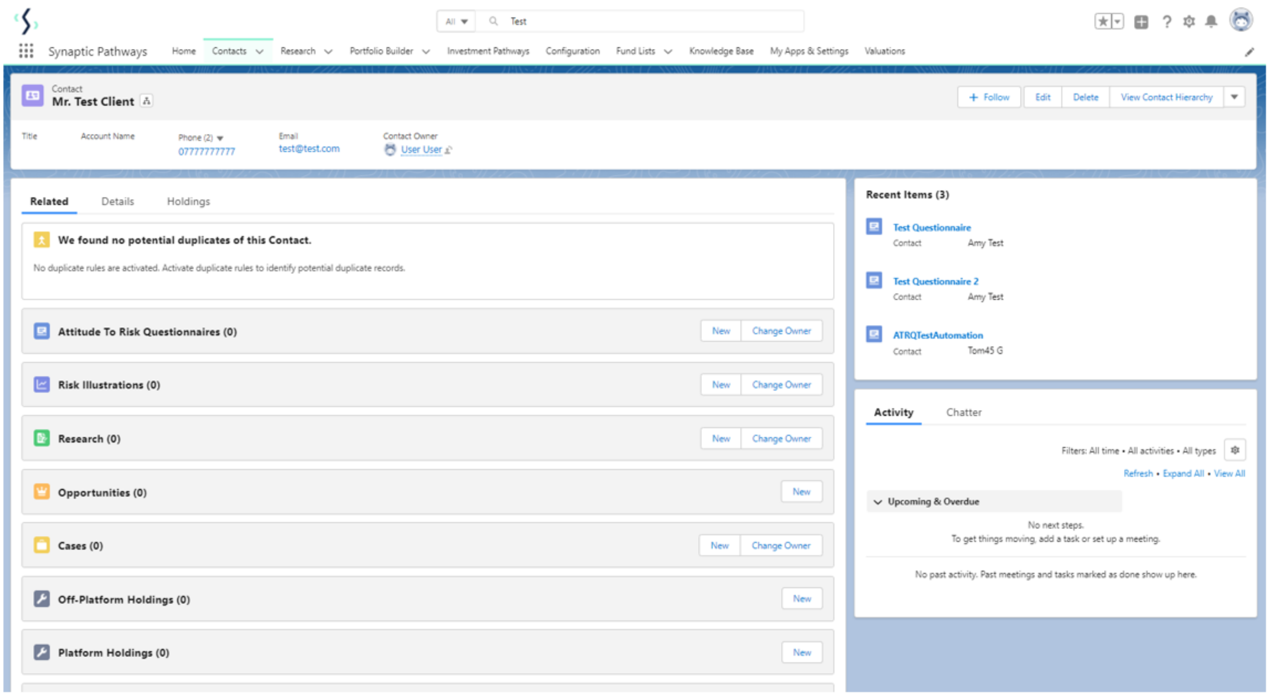
Last Modified on 25/05/2022 4:52 pm BST

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

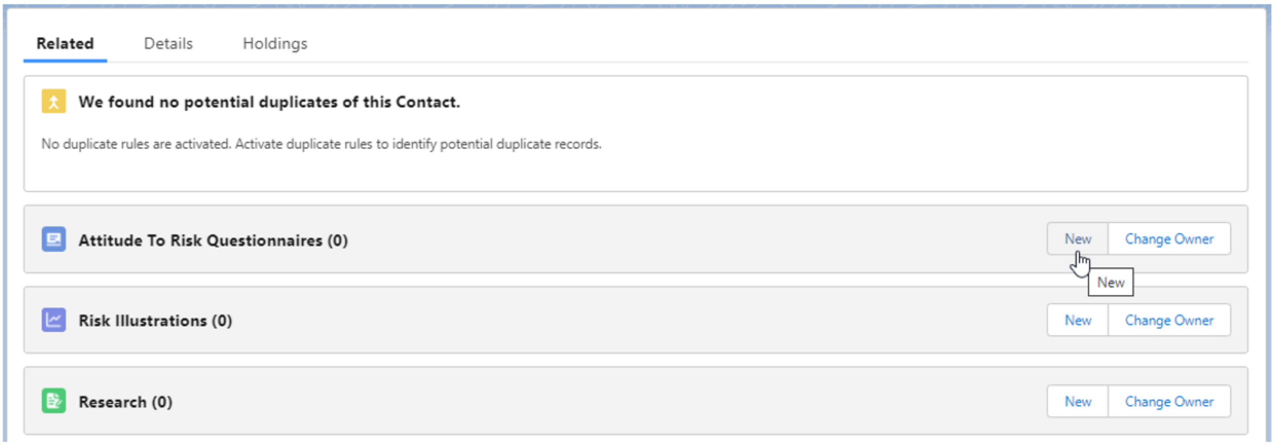
In this example, I will search for a contact called ‘Test Client 1’:



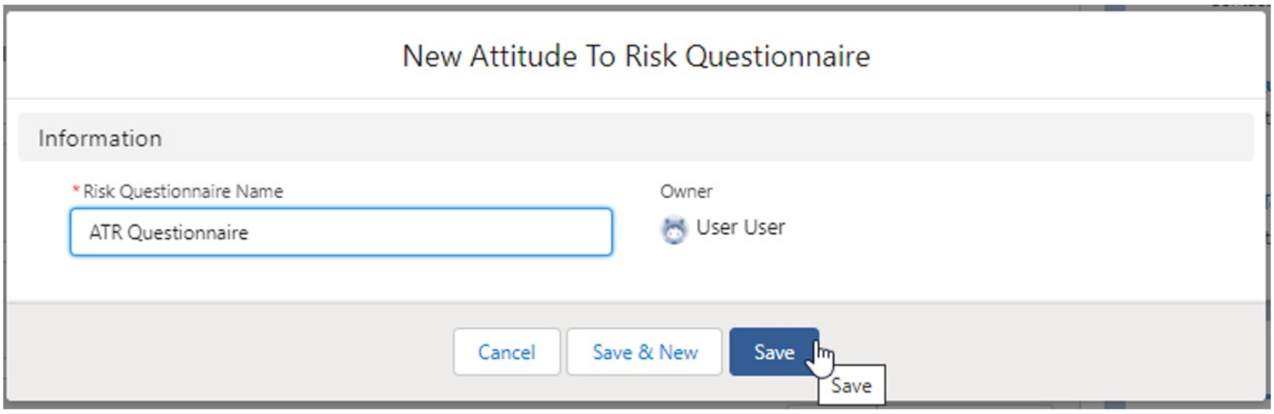
This will load up their contact record:



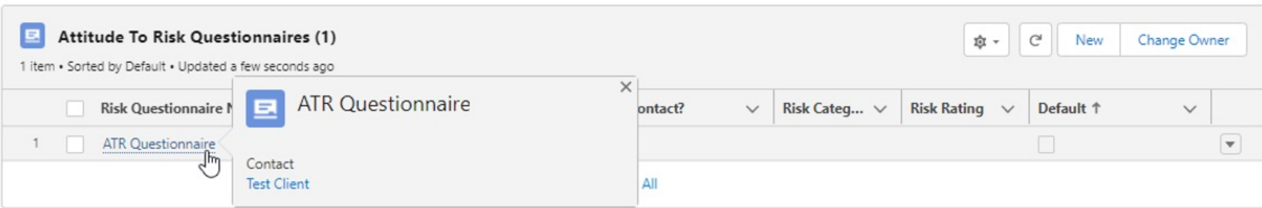
To create an attitude to risk questionnaire, click ‘New’ next to ‘Attitude To Risk Questionnaire’



Enter the questionnaire name and click ‘Save’:



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:



Once within the questionnaire, click on ‘Send to Contact to Complete’

A success message will pop-up once sent:

If you receive an error message – you will need to check the email address is entered on the contact and correct:

Error!
Client email address is not valid, please review and try again

This will change the completed by client field to 'Pending'.

Attitude To Risk Questionnaires (1)

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

New | Change Owner

	Risk Questionnaire Name	Completed by Contact?	Risk Category	Risk Rating	Default ↑
1	ATR Questionnaire	Pending			

View All

Your client will receive an email – see below for an example:

Hello Test,

As we discussed, here is an Attitude to Risk questionnaire that I'd like you to complete.

Please complete the Risk Questionnaire to enable us to have a further conversation about your objectives. Thank you

You do not have to enter any personal data. It's simply a list of questions about how you perceive financial risk.

This is a one-time use, private access portal. You can access it through this link:

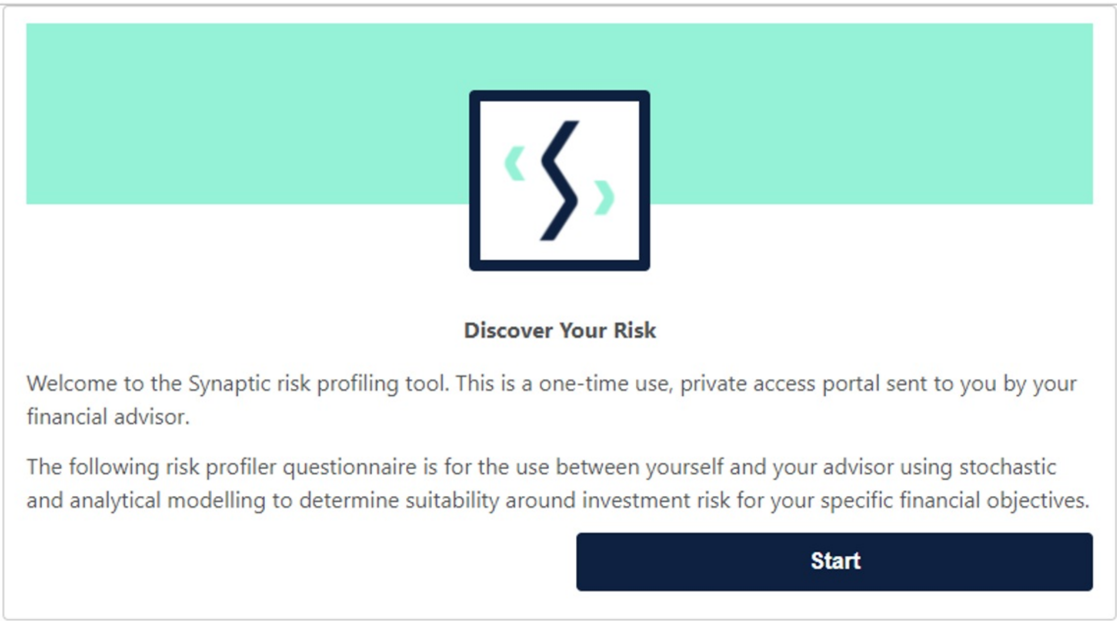
https://atrqquestionnaireuat.UM6.force.com/questionnaire?Id=a034K000001qUeWQAU

Once you've completed the questionnaire, I'll get a notification to say it's ready for me to look at.

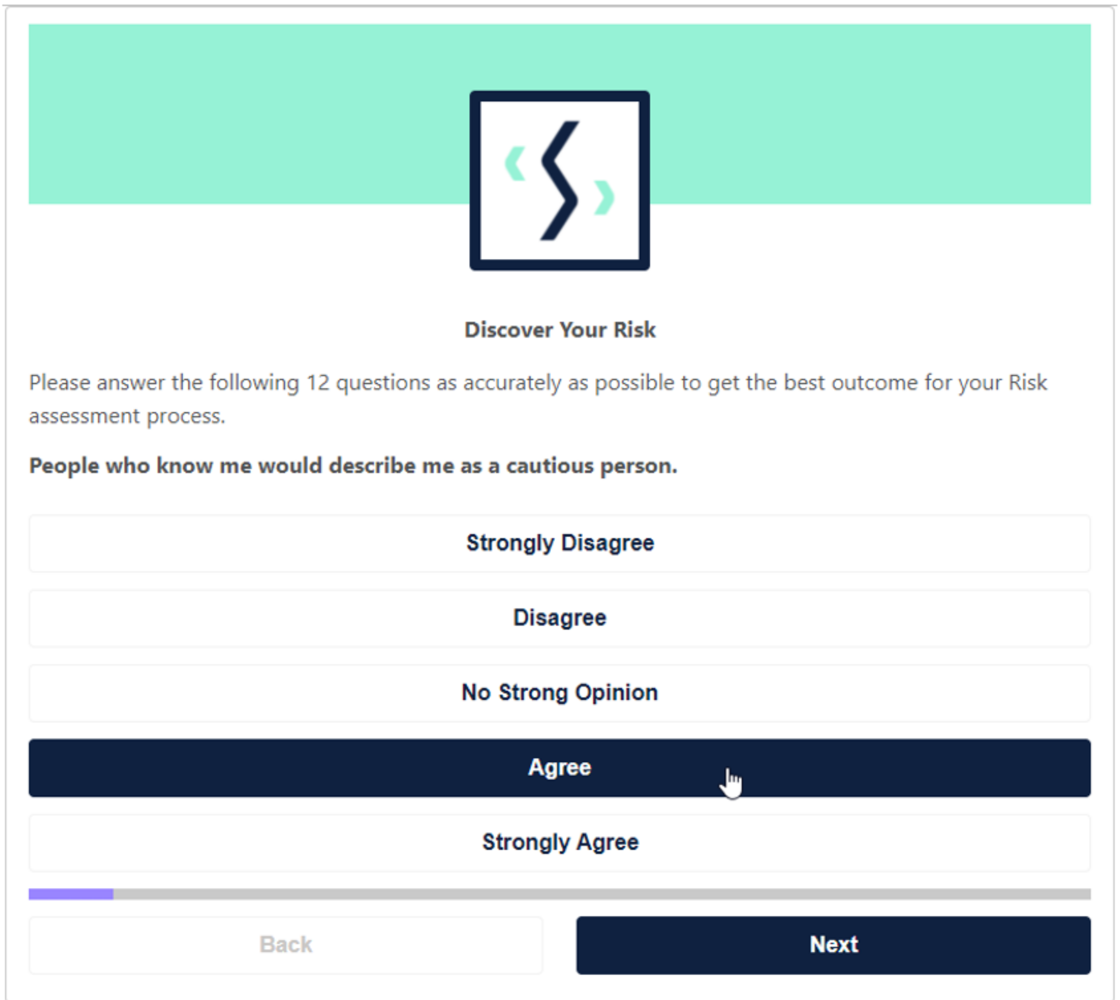
If you have any questions about this, please do not hesitate to contact me.

Many thanks,
Amy Paulsen

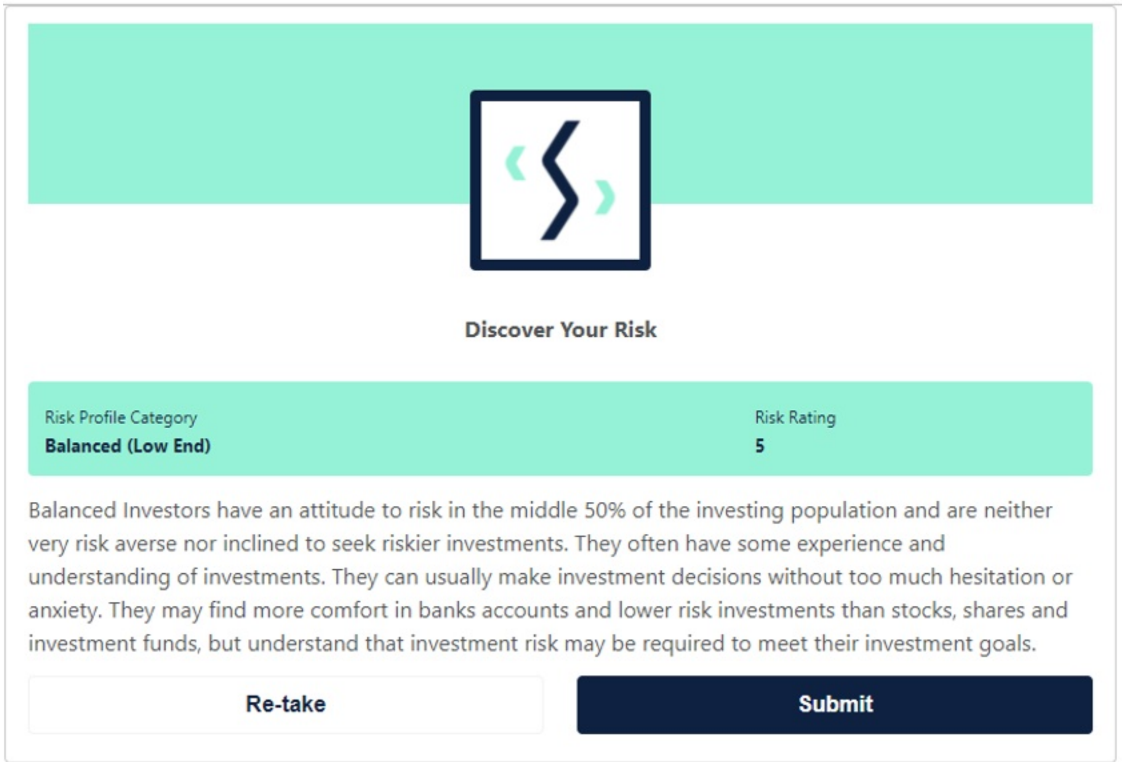
When your client clicks the link, they will be taken to the screen below:



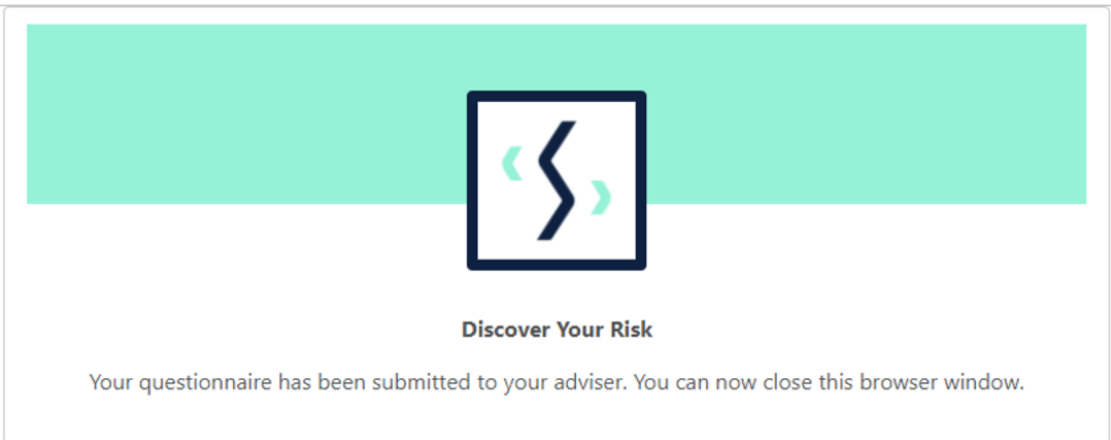
They will need to answer each question one by one before submitting their response:



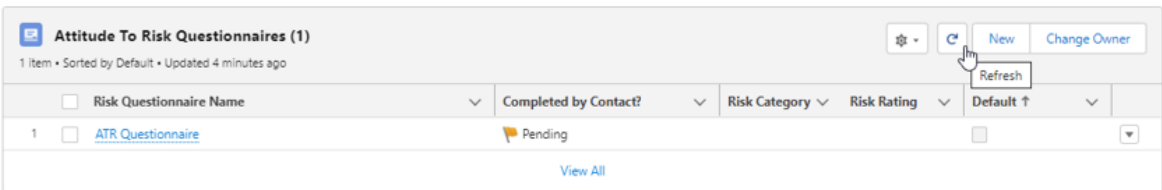
They are able to re-take if needed. Otherwise they can ‘Submit’ answers through to you.

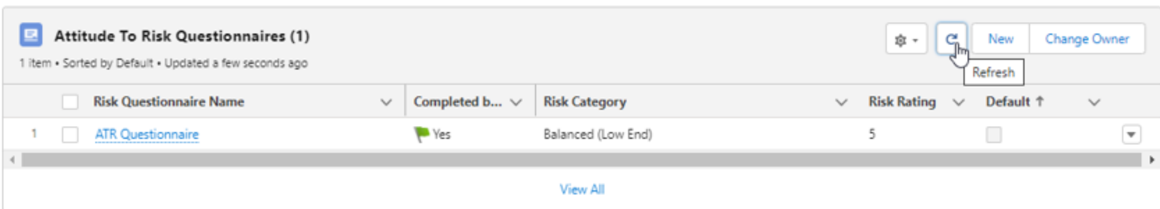


This will send you an email notification to say this is complete.

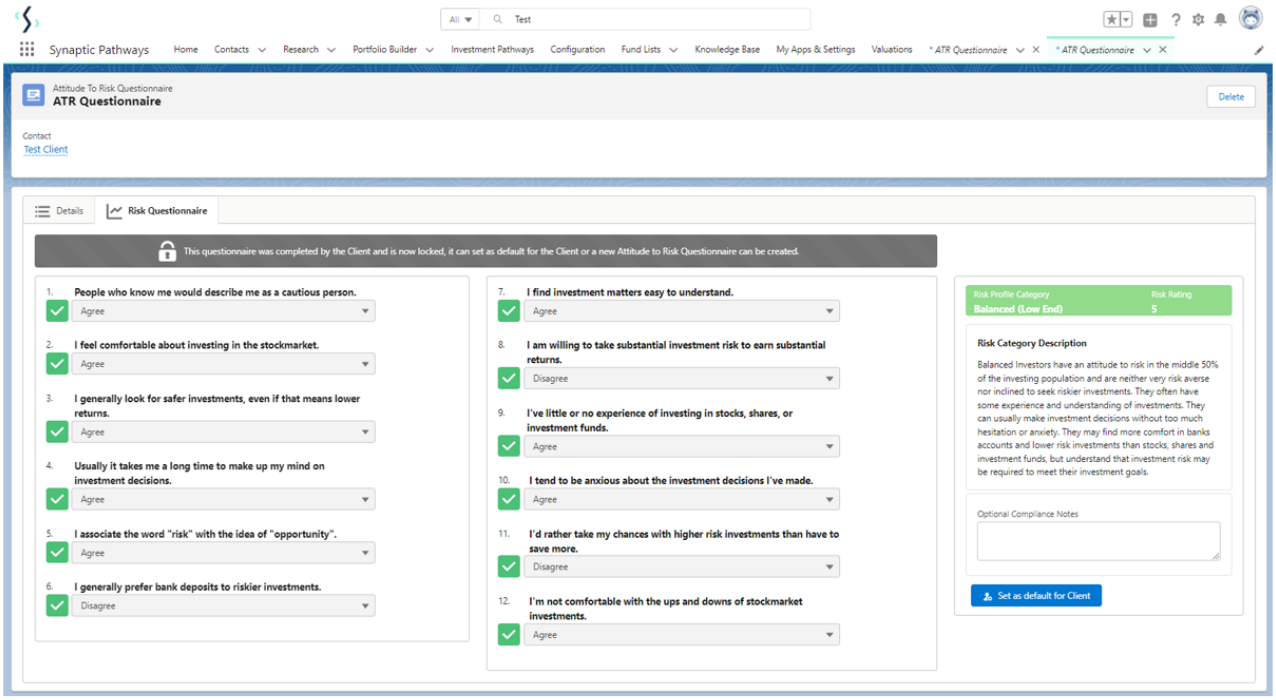


You will need to navigate back to your client to view the completed attitude to risk. Click the 'refresh' button if the client has just completed the questionnaire. It will change the 'Completed by contact' field to 'Yes':

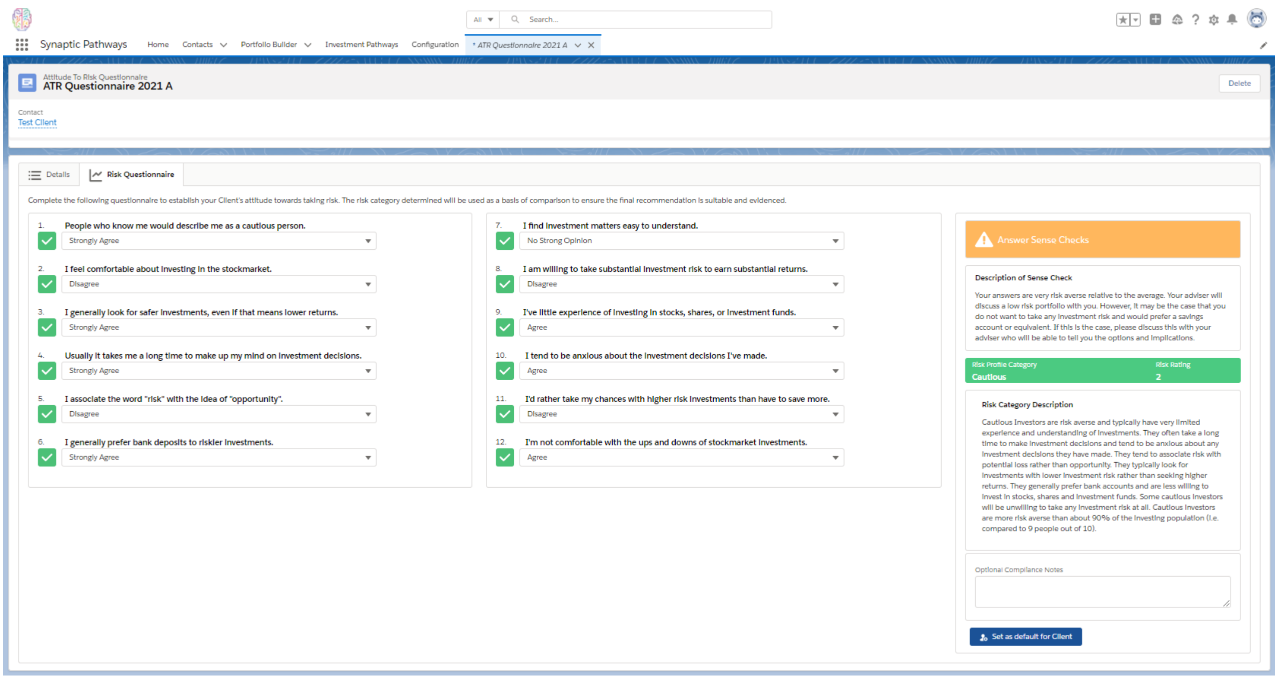


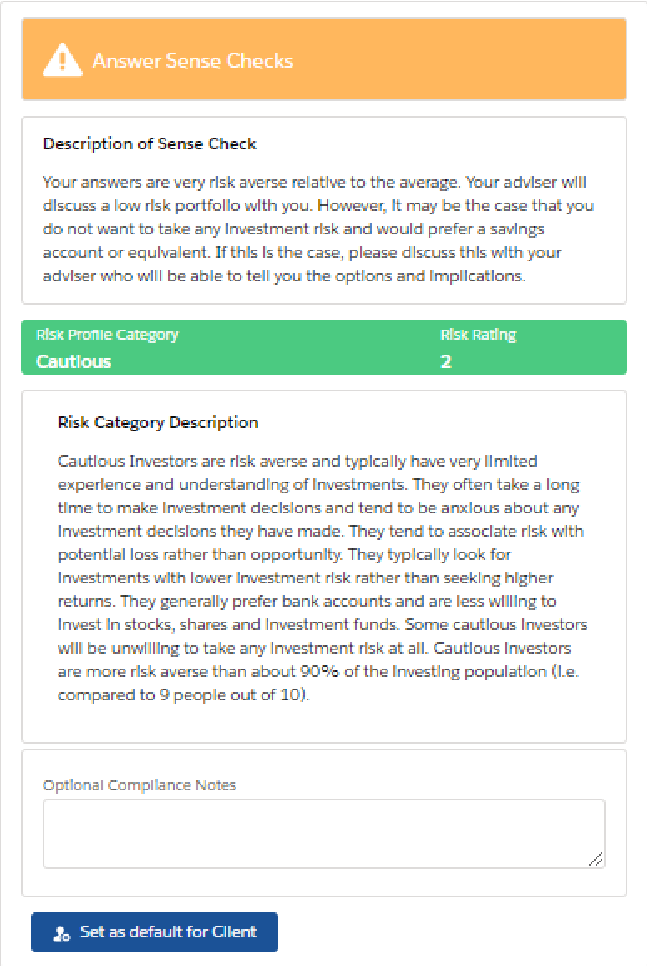


Once completed, the questionnaire will be locked. You will see the risk rating on the right-hand side.

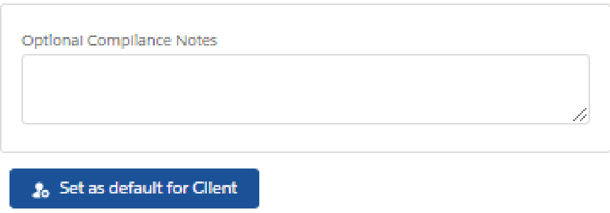


In this example there is a sense check, as the client has answered on the cautious side.





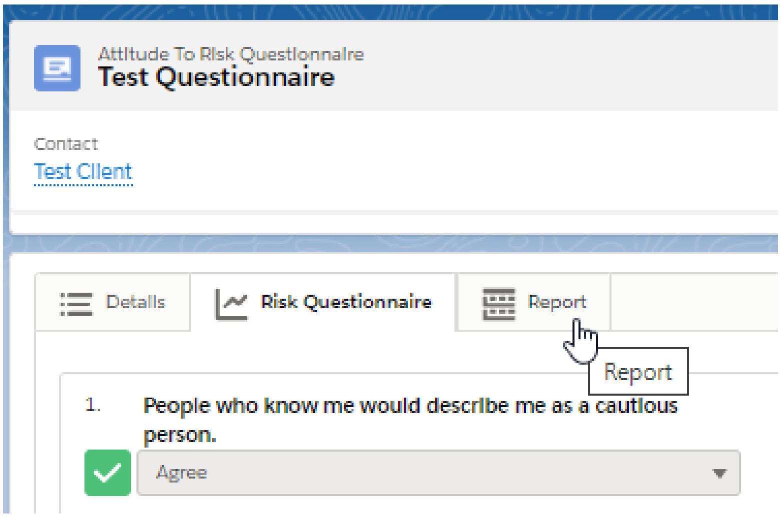
If you would like to enter any compliance notes, enter them here:



When you are happy it is complete, click the ‘Set as default for Contact’. (This is important for any illustration you create for your client)

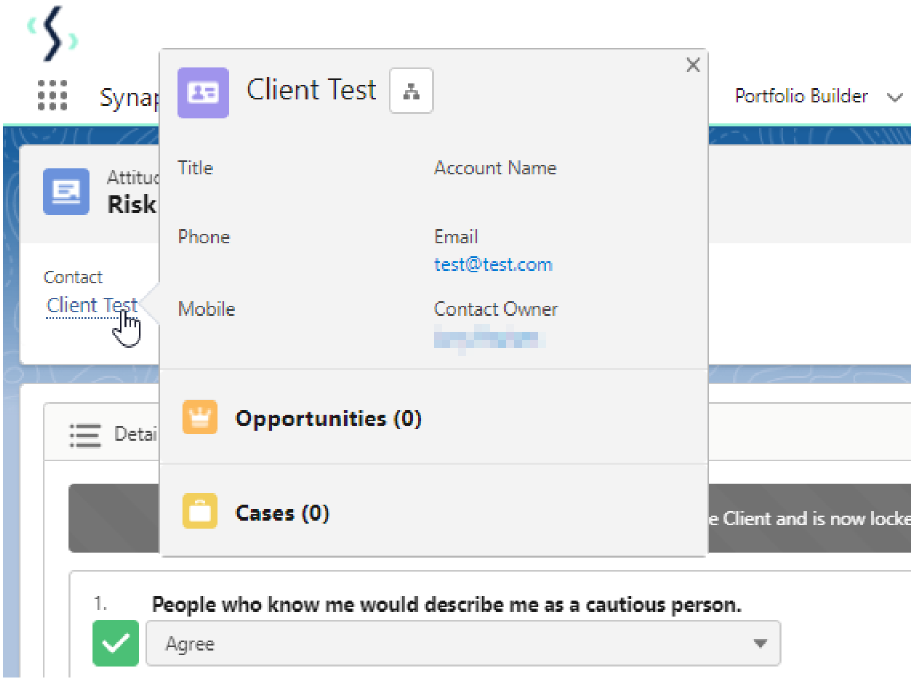
A success message will appear:

Once set to default, the Report tab will appear:



See article - Attitude to Risk Questionnaire Report

Click on the contact name to return:



This will mark your client’s attitude to risk as complete: