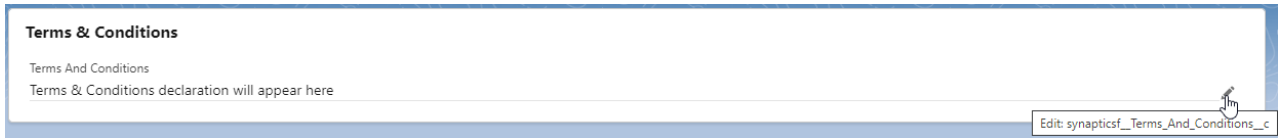


Company Settings - Branding

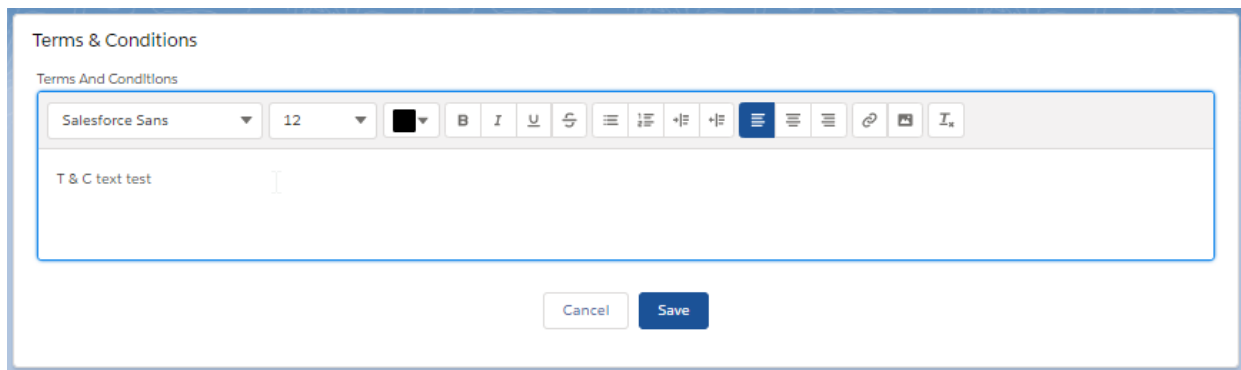
Last Modified on 26/05/2022 12:56 pm BST

The Terms & Conditions, Disclaimer and Risk Questionnaire Message areas allow you to add your own wording which will appear on digital outputs.

Edit by selecting the pen icon to the right of the field:

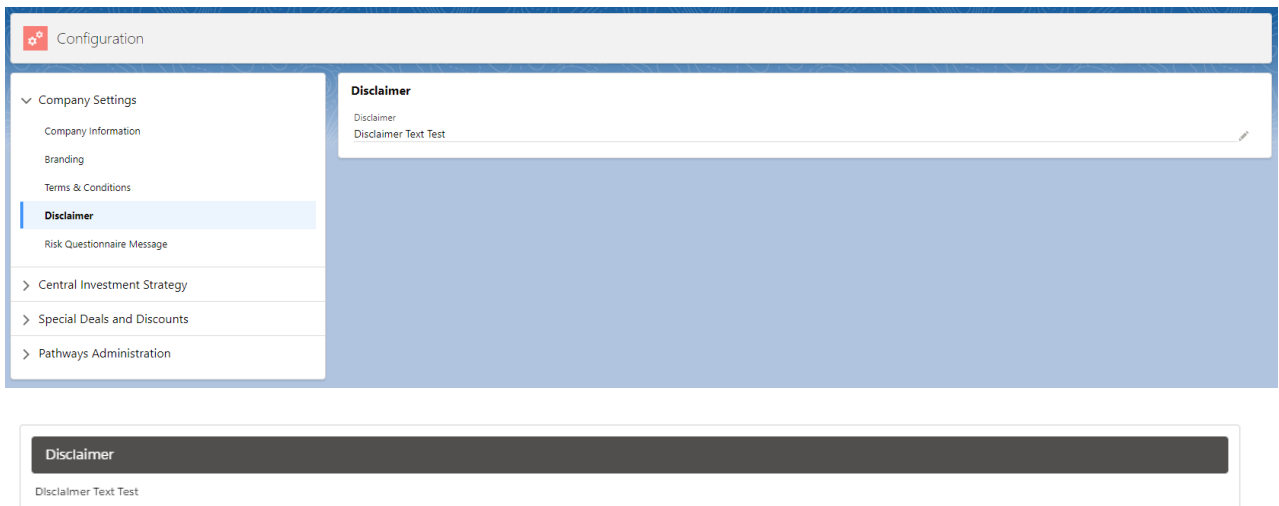


Add in your Terms & Conditions text and 'Save'

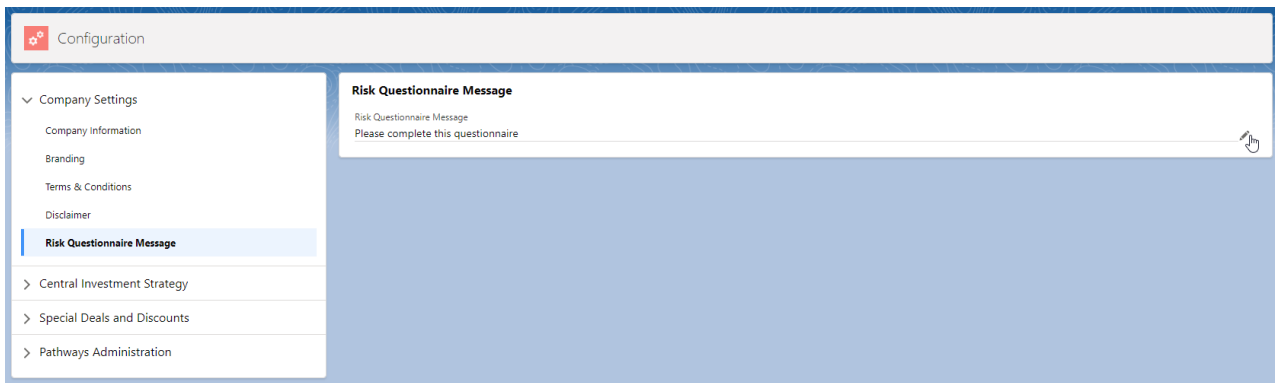


Disclaimer and Risk Questionnaire Message work in the same way:

The Disclaimer will appear on your reports and as a footer in emails to the client:



The Risk Questionnaire Message will appear on the email sent to the client to complete an attitude to risk questionnaire.



Hello Test,

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

Please complete this questionnaire

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://atrquestionnaireuat.UM6.force.com/questionnaire?id=a034K000001HQDgQAO>

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

Andrea Advisor

Disclaimer Text Test