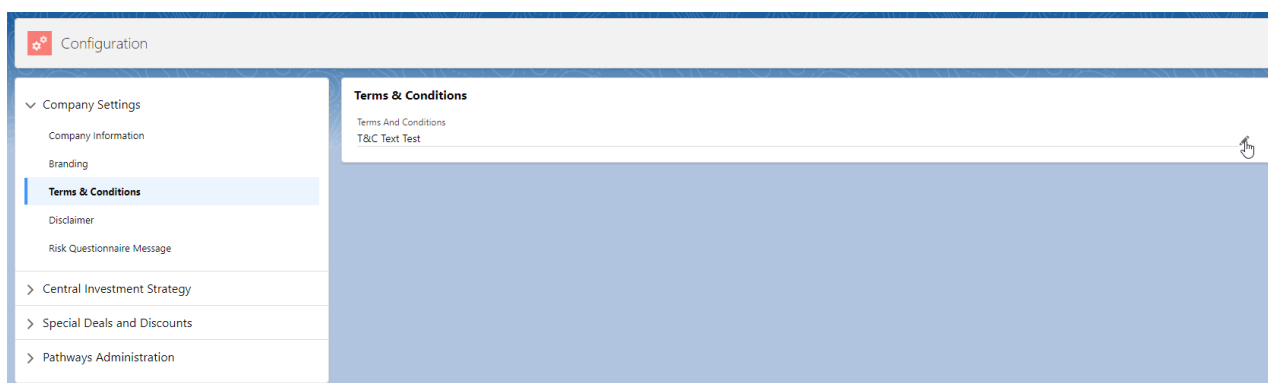


# Company Settings - Terms & Conditions, Disclaimer and Risk Questionnaire Message

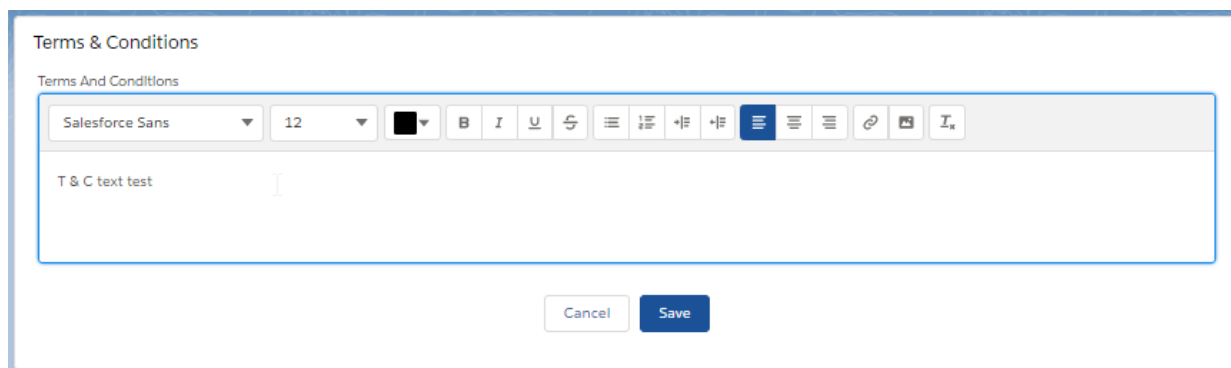
Last Modified on 18/11/2021 1:34 pm GMT

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:

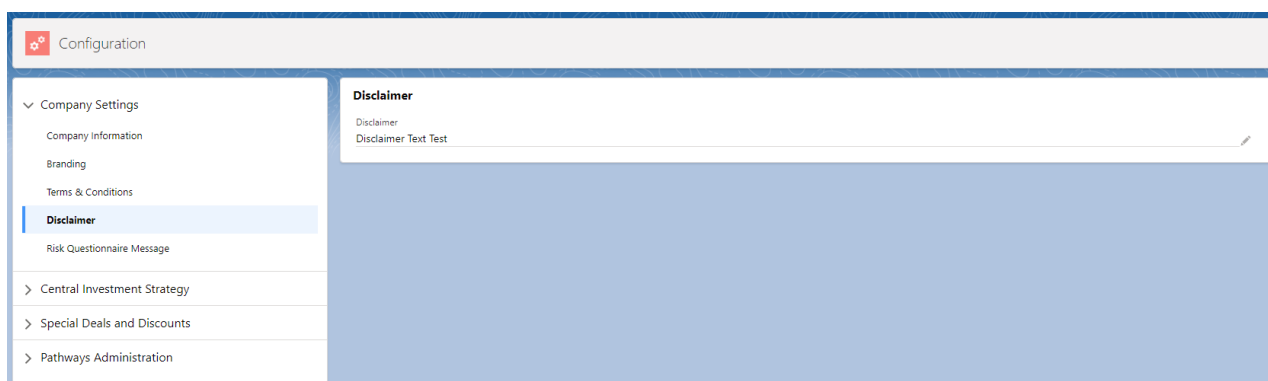


Add in your Terms & Conditions text and 'Save'



Disclaimer and Risk Questionnaire Message work in the same way:

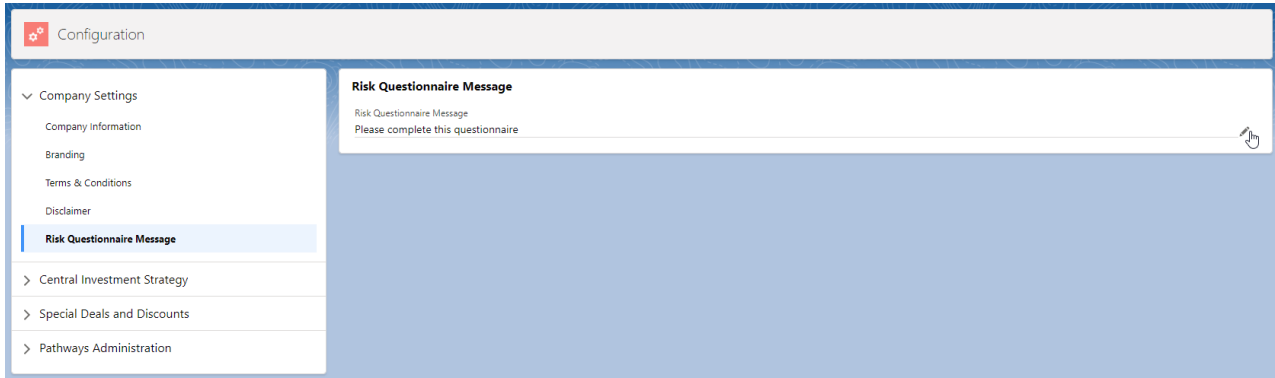
The Disclaimer will appear on your reports and as a footer in emails to the client:



Disclaimer

Disclaimer Text Test

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



The screenshot shows a configuration interface with a sidebar on the left and a main content area on the right. The sidebar is titled "Configuration" and contains a list of settings: Company Settings (expanded), Company Information, Branding, Terms & Conditions, Disclaimer, Risk Questionnaire Message (selected), Central Investment Strategy, Special Deals and Discounts, and Pathways Administration. The main content area is titled "Risk Questionnaire Message" and contains the text "Risk Questionnaire Message" and "Please complete this 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



SYNAPTIC  
SOFTWARE

Andrea Advisor

Disclaimer Text Test