

# Risk Illustrations

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Illustrations are found within the Contact record:

The screenshot shows a CRM interface for a contact named 'Mr. Test Client'. The contact details include phone number '0777777777', email 'test@test.co.uk', and contact owner 'User User'. The main content area is divided into several sections:

- Related**: Contains a message 'We found no potential duplicates of this Contact.' and a table for 'Attitude To Risk Questionnaires (1)'. The table has columns for Risk Questionnaire Name, Completed by Cont..., Risk Category, Risk Rating, and Default. One row is visible for 'ATR Questionnaire' with a 'Yes' completion status and a 'Balanced (Low End)' risk category.
- Risk Illustrations (0)**: This section is highlighted with a red border and contains a 'New' button and a 'Change Owner' button.
- Research (0)**: Contains a 'New' button and a 'Change Owner' button.
- Opportunities (0)**: Contains a 'New' button.
- Cases (0)**: Contains a 'New' button and a 'Change Owner' button.
- Off-Platform Holdings (0)**: Contains a 'New' button.

On the right side, there are two panels:

- Recent Items (3)**: Lists three items: 'ATR Questionnaire' (Contact: Test Client), 'Test Questionnaire' (Contact: Amy Test), and 'Test Questionnaire 2' (Contact: Amy Test).
- Activity**: Shows filters for 'All time', 'All activities', and 'All types'. Below the filters, there is a section for 'Upcoming & Overdue' with the message: 'No next steps. To get things moving, add a task or set up a meeting. No past activity. Past meetings and tasks marked as done show up here.'

If an Attitude to Risk questionnaire has been completed and set to default, the client's risk category will show here.

This is the progress bar. Complete the details in each screen and 'Continue to Next Step' at the bottom left. As you work your way through the screens, the bar will change to a green tick to show as completed. You can click back through these if you need to amend any information later in the journey.

Your Illustration will appear in the toolbar – allowing you to work on more than one task at a time.

The Illustration can be duplicated & the title & description edited. You can also delete the Illustration & change the owner to a colleague.

The screenshot shows the 'Risk Illustration' software interface. At the top, there is a navigation menu with options like 'Home', 'Contacts', 'Research', 'Portfolio Builder', and 'Investment Pathway'. Below the menu, the main header displays 'Risk Illustration' and 'Client: Client Test'. The main content area is divided into several sections: 'Investment Details', 'Pathway Selection', 'Charges & Fees', 'Outcome', and 'Report'. The 'Investment Details' section includes fields for 'Term of investment' (10 years), 'Initial Amount' (£200,000.00), 'Regular Contribution' (£300.00 / pm), and 'Regular Withdrawal' (£300.00 / pm). The 'Pathway Selection' section includes 'Growth Basis Without Inflation' (Rebalanced Annually) and 'Total Solution Cost' (1.70%). The 'Outcome' section shows 'Investment Risk Category' (Balanced (Low End)) and 'Objective Risk Category' (Balanced (High End)). The 'Report' section displays 'Expected Outcome (Mean Gain)', 'Lowest Outcome (Min. Gain)', and 'Highest Outcome (Max. Gain)'. There is also an 'Additional Information' section with text explaining the illustration's purpose. At the bottom, there are 'Cancel' and 'Continue to Next Step' buttons.

These tiles will populate as you enter details of the Illustration. This summary will be available throughout the journey to refer to.

Progress back and forth through the screens using these buttons.

As you complete Investment details, the tiles above will populate

Additional Information about the screen you are on.