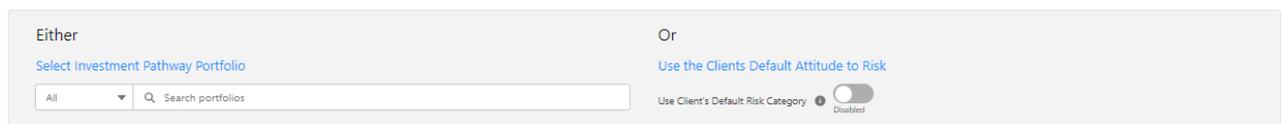
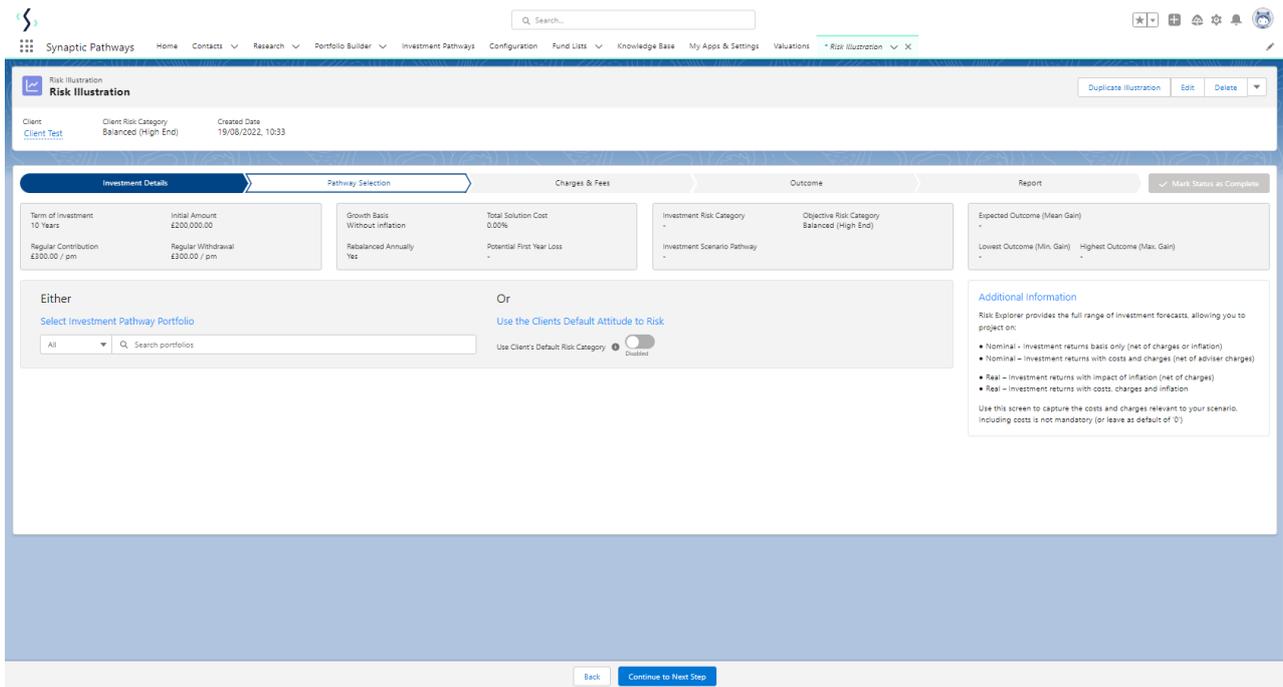


Risk Illustrations - Pathway Selection

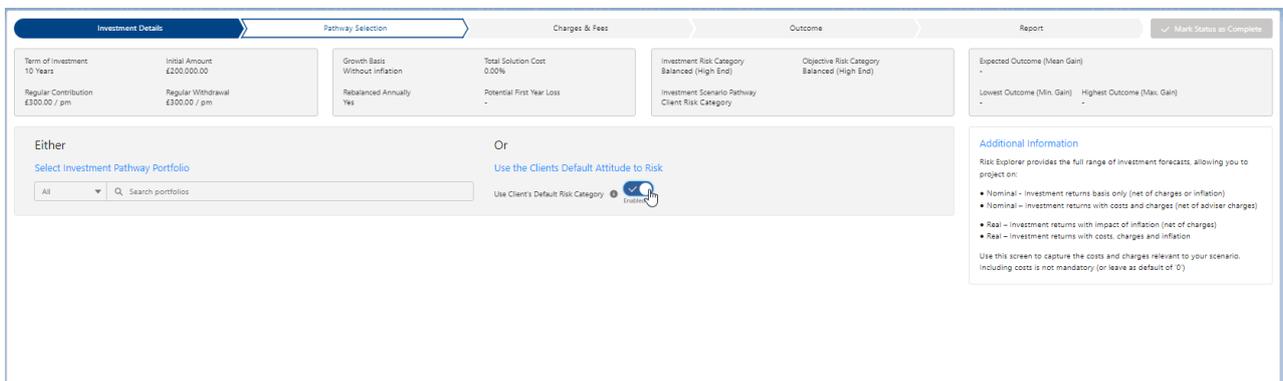
Last Modified on 19/08/2022 4:01 pm BST

This article is a continuation of - [Risk Illustrations - Investment Details](#)

In the Pathway Selection screen, you can either Select an Investment Category Pathway Portfolio or Use the Clients Default Attitude to Risk.



If you would like to use the client's risk rating rather than a portfolio, click 'Use Client's Default Risk Category'. This will grey out the portfolio search box and the 'Target Pathway' & 'Target Risk Category' will populate on the top right:



Please note - If the 'Use Client's Default Risk Category' field is greyed out, a risk questionnaire has not been completed for the client or has not been set to default. See article - [Why is the 'Use](#)

Client's Default Risk Category' greyed out on the Pathway Selection screen?

If you would like to use a portfolio in the illustration, leave the 'Use the Client's Default Risk Category' disabled and find a portfolio in the 'Search portfolios' box.

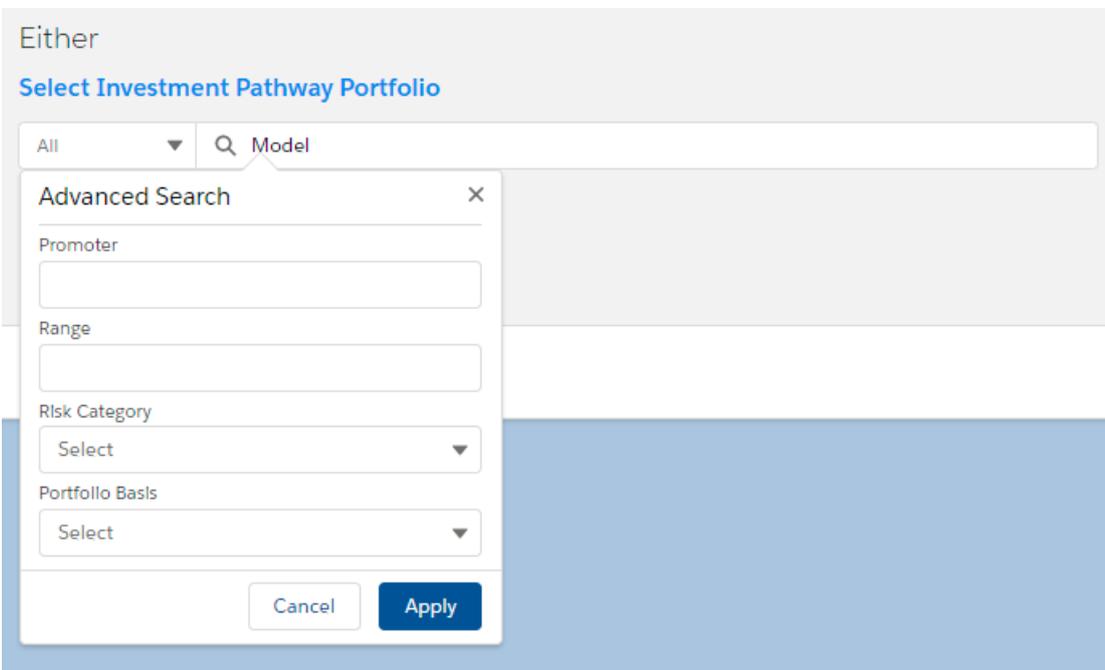
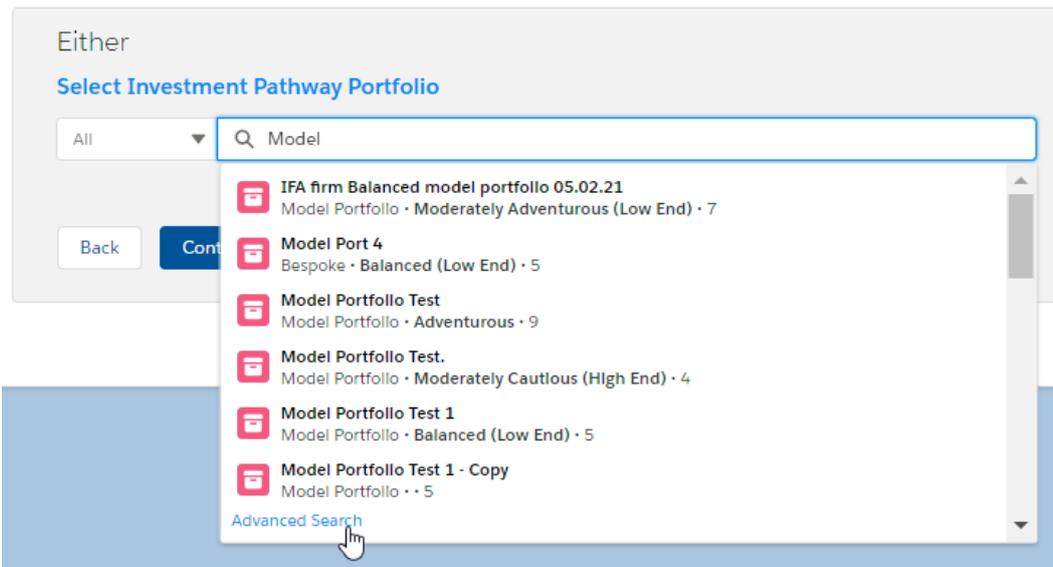
You are able to search for any Model or Bespoke Portfolios you have created, as well as any portfolio we have available (this includes Discretionary Fund Managers, Insurance Distributions Directives and Multi-Assets):

The screenshot shows the 'Pathway Selection' step in a multi-step process. It includes sections for 'Investment Details', 'Charges & Fees', 'Outcome', and 'Report'. A search bar is active, displaying a list of portfolios such as 'Risk Managed 1', 'Parmenton Tactical Active RG10', and 'Passive Moderately Cautious'. A toggle for 'Use Client's Default Risk Category' is shown as disabled.

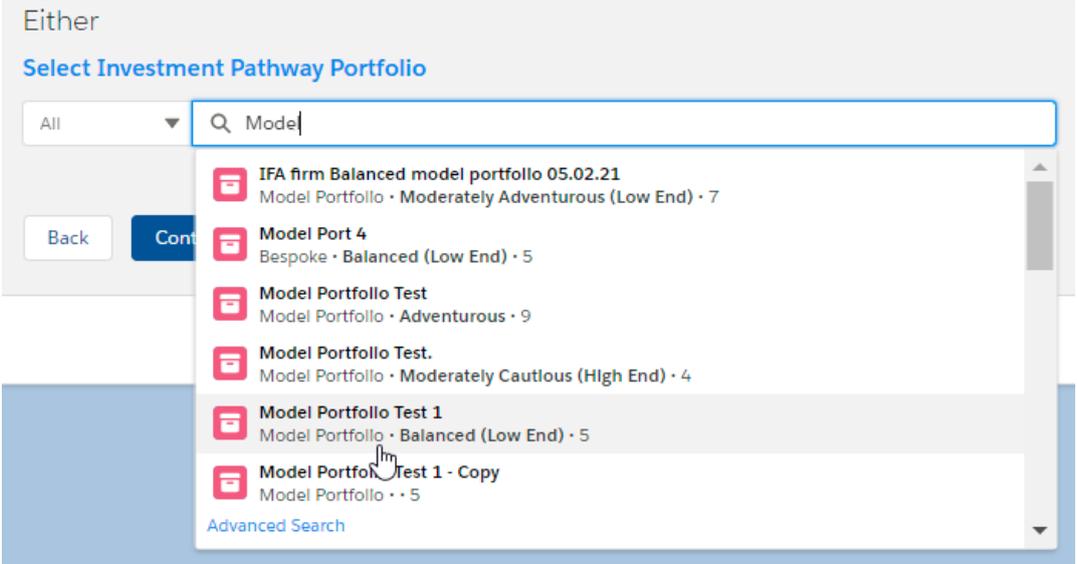
You can narrow the results using the drop down & advanced search options:

This screenshot shows the search dropdown menu open, listing categories: 'All', 'In-House Discretionary ...', 'Bespoke Portfolio', 'Discretionary Fund Man...', 'Insurance Distribution D...', 'Model Portfolio', and 'Multi-Asset'. The 'Model Portfolio' option is highlighted with a mouse cursor.

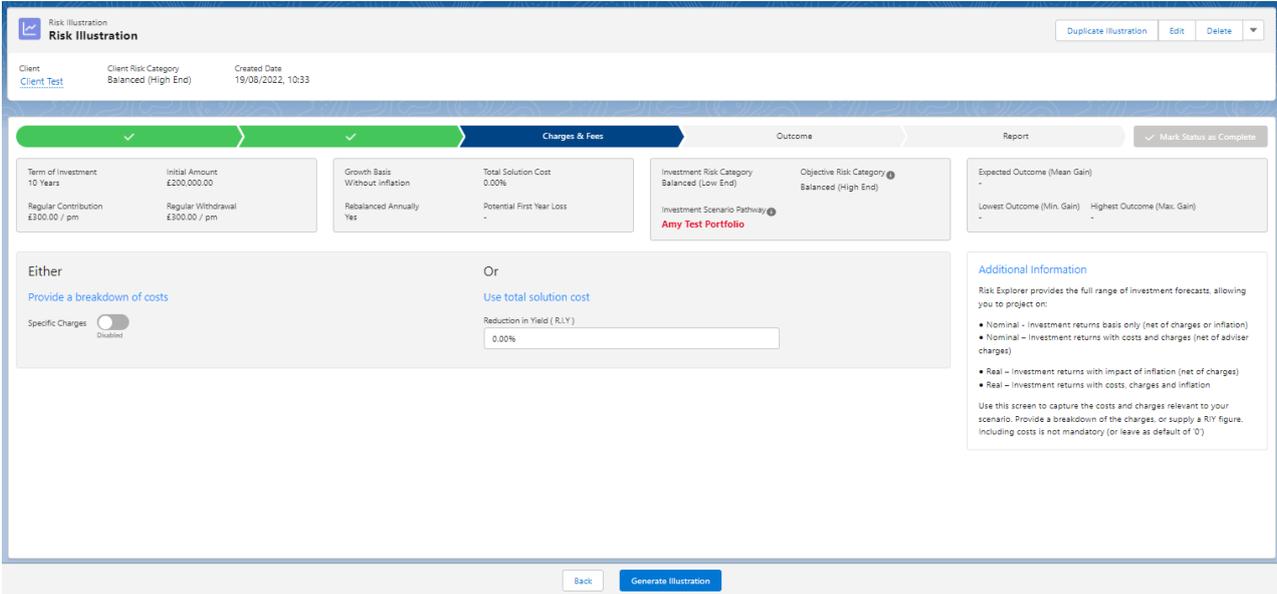
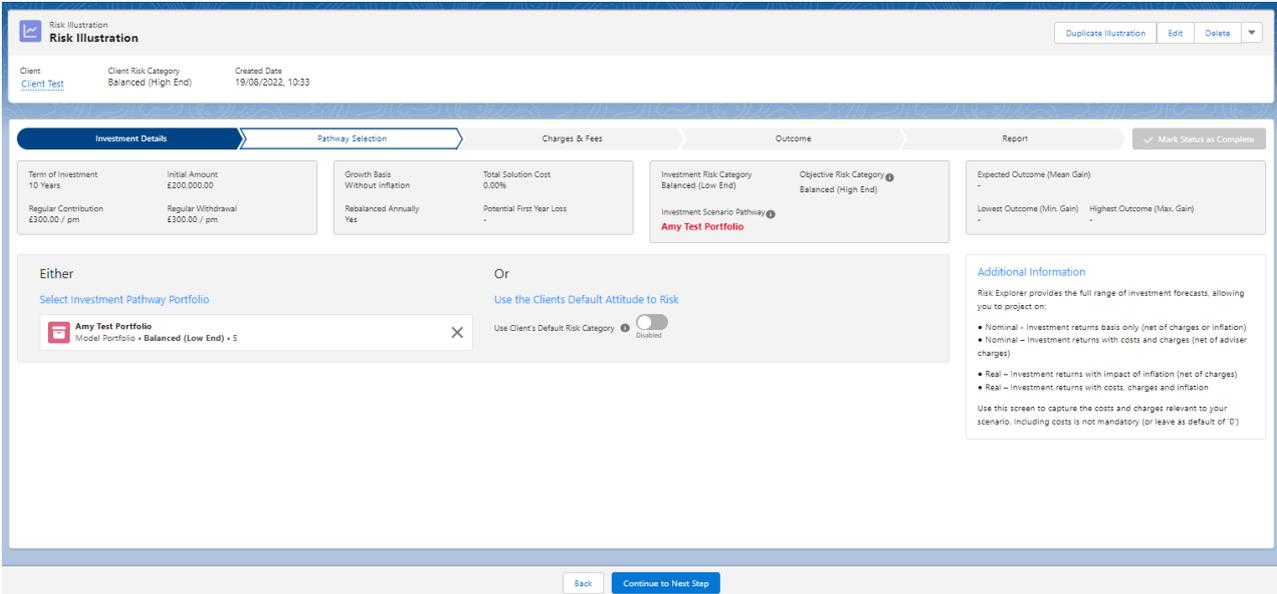
Advanced search will give you the option of searching by Promoter, Range, Risk Category and Portfolio Basis:



For this example, I will be selecting a Model Portfolio I have created in Portfolio Builder:



Once selected, click 'Continue to Next Step' to the 'Charges & Fees' section:



For further information on the 'Charges & Fees' screen, see article

[Risk Illustrations - Charges & Fees](#)
