

Where do the Compliance notes in the Attitude to Risk Questionnaire pull through to?

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Compliance Notes pull through to the Attitude to Risk Questionnaire Report:

Attitude To Risk Questionnaire
Test Risk Questionnaire Delete

Contact
[Test Client](#)

Details Risk Questionnaire Report

1. People who know me would describe me as a cautious person. → Agree	7. I find investment matters easy to understand. → Agree	Risk Profile Category Balanced (Low End) Risk Rating 5	
2. I feel comfortable about investing in the stockmarket. → Agree	8. I am willing to take substantial investment risk to earn substantial returns. → Disagree		Compliance Notes Test Compliance Notes
3. I generally look for safer investments, even if that means lower returns. → Agree	9. I've little or no experience of investing in stocks, shares, or investment funds. → Agree		
4. Usually it takes me a long time to make up my mind on investment decisions. → Agree	10. I tend to be anxious about the investment decisions I've made. → Agree		
5. I associate the word "risk" with the idea of "opportunity". → Disagree	11. I'd rather take my chances with higher risk investments than have to save more. → Disagree		
6. I generally prefer bank deposits to riskier investments. → Disagree	12. I'm not comfortable with the ups and downs of stockmarket investments. → Disagree		

Attitude To Risk Questionnaire
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Outcome

Client Details

Client Name Test Client

Risk Profile

Risk Profile Category Balanced (Low End)
Risk Rating 5
Risk Category Description Balanced Investors have an attitude to risk in the middle 50% of the investing population and are neither very risk averse nor inclined to seek riskier investments. They often have some experience and understanding of investments. They can usually make investment decisions without too much hesitation or anxiety. They may find more comfort in banks accounts and lower risk investments than stocks, shares and investment funds, but understand that investment risk may be required to meet their investment goals.

Description of Sense Check

Notes

Compliance Notes
Test Compliance Notes

Previous Risk Profiles