

Why do I need to complete a new Attitude to Risk Questionnaire after the update?

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Changes to the latest Investment Strategy requires you to complete a new Attitude to Risk Questionnaire for your client. A field has been added to show the client's Previous Risk Rating, as seen below:

| | | |
|---------------------------|-------------------------------|---------|
| Attitude to Risk | (No Attitude to Risk Defined) | Edit... |
| Previous Attitude to Risk | Balanced | |
