

# Client Check-in

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The **Client Check-In** allows you to add commentary to evidence that the clients attitude to risk, knowledge & experience and personal circumstances have been assessed.

The screenshot displays the 'Client Check-in' interface for a 'Test Illustration Apr22'. The interface includes a navigation bar with 'Research' selected, a search bar, and a 'Convert to Holding' button. Below the navigation, there are tabs for 'Research', 'Client Check-in', and 'Report'. A 'Mark Status as Complete' button is also present. The main content area is divided into five sections, each with a declaration and a text input area with a rich text editor toolbar:

- Attitude to Risk:** Declaration of Attitude to Risk. Provide details to evidence that the illustration(s) are suitable given the clients current overall attitude to risk.
- Knowledge & Experience:** Declaration of Knowledge & Experience. Provide details to evidence that the illustration(s) are suitable given the clients current knowledge and experience.
- Personal Circumstances:** Declaration of Personal Circumstances. Provide details to evidence that the illustration(s) are suitable given the clients personal circumstances.
- Tolerance for Loss:** Declaration of Tolerance for Loss. Provide details to evidence that the illustration(s) are suitable given the clients tolerance for loss.
- Capacity for Loss:** Declaration of Capacity for Loss. Provide details to evidence that the illustration(s) are suitable given the clients capacity for loss.

At the bottom of the interface, there are two buttons: 'Back to Ex-ante Illustration' and 'Continue to Report'.

Once complete, **Continue to Report**

Back to Ex-ante Illustration    Continue to Report