

Client Check-in - CIP

Last Modified on 26/05/2022 11:36 am BST

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 within a software application. At the top, there is a navigation menu with options like 'Synaptic Pathways', 'Home', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. A search bar is also present. The main content area is titled 'Research Test Illustration Apr22' and includes a 'Convert to Holding' button. Below this, a progress bar shows the current step as 'Client Check-in', with 'Research' and 'Report' as previous and next steps respectively. A 'Mark Status as Complete' button is also visible. The main content area is divided into five sections, each with a blue header and a declaration form:

- 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.

Each declaration form includes a text area with a rich text editor toolbar (font, size, bold, italic, underline, link, unlink, list, list, indent, outdent, undo, redo, print) and a 'Salesforce Sans' font dropdown. At the bottom of the interface, there are two buttons: 'Back to Ex-ante Illustration' and 'Continue to Report'.

Once complete, **Continue to Report**

Two buttons are shown: 'Back to Ex-ante Illustration' and 'Continue to Report'. The 'Continue to Report' button is highlighted with a mouse cursor, indicating it is the next step.