Setting Attitude to Risk Manually

Last Modified on 25/05/2022 4:53 pm BST

To create an attitude to risk questionnaire, create a new contact or find an existing contact record.

In this example, I will search for a contact called 'Test Client 1':



This will load up their contact record:

All V Q. Test	Settings Valuations
Contact Mr. Test Client Image: Contact Owner Title Account Name Prone (2) • Email test@test.com Contact Owner User User <u>a</u> * Contact Owner Image: Contact Owner Image: Contact Owner	+ Follow Edit Delete View Contact Hierarchy 💌
Related Details Holdings Image: Second contential duplicates of this Contact. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.	Recent Items (3) Text Questionnaire Contact Any Text Contact Any Text Contact Any Text
Attitude To Risk Questionnaires (0) New Change Owner	ATRQTestAutomation Contact Tom45 G
Risk Illustrations (0) New Change Owner Research (0) New Change Owner	Activity Chatter Filters: All time + All activities + All types 🔹
Opportunities (0)	Refresh • Expand All • View All
Cases (0) New Change Owner	No next steps. To get things moving, add a task or set up a meeting. No past activity. Past meetings and tasks marked as done show up here.
Off-Platform Holdings (0) New	
Platform Holdings (0)	

To create an attitude to risk questionnaire, click 'New' next to 'Attitude To Risk Questionnaire'

Related Details Holdings				
We found no potential duplicates of this Contact. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.				
Attitude To Risk Questionnaires (0)	New Change Owner			
Risk Illustrations (0)	New Change Owner			
Research (0)	New Change Owner			

Enter the questionnaire name and click 'Save':

	New Attitude To Risk Questionnaire			
Information				
* Risk Questionnaire Name ATR Questionnaire	Owner 😸 User User			
	Cancel Save & New Save Market Save			
Attitude To Risk Questionna	aire <u>"ATR Questionnaire</u> " was created. 🗙			

This will take you back to the contact record. To complete the questionnaire or send to a client to complete, click on the name of the questionnaire:

Attitude To Risk Ques 1 item • Sorted by Default • Updated	tionnaires (1) a few seconds ago				\$ v	C ^t New	Change Own	ner
Risk Questionnaire	ATR Questionnaire	ontact?	~	Risk Categ 🗸	Risk Rating 🗸	Default ↑	~	
1 ATR Questionnaire								•
2.	Test Client	All						

Click 'Complete Manually'

Synaptic Pathways Hore Contacts & Research & Portolio Builder & Investment Atthuets Is Risk Questionnaire arts Petalis Response Respons	it Pathways Configuration Fund Lists V Knowledge Base My Apps & Settings Value mined will be used as a basis of comparison to ensure the final recommendation is suitable and eviden 7. I find investment matters easy to understand. Select an option v 8. I am willing to take substantial Investment risk to earn substantial refurms. Select an option v 9. I Ve little or no experience of investing in stocks, shares, or	tions *AR Questionnaire V X
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	nined will be used as a basis of comparison to ensure the final recommendation is suitable and eviden 7. I find investment matters easy to understand. I find investment matters easy to understand. I find investment matters easy to understand. I am willing to take substantial investment risk to earn substantial returns. I select an option Select an option I velocity I velocity Select an option I velocity Velocity I velocity Velocity	ced. Send to Client to Complete > O Complete Manually Bits Positie Category Bits Raining
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Details Image: Comparison of the set of th	inined will be used as a basis of comparison to ensure the final recommendation is suitable and eviden	cod Send to Client to Complete > Complete Monually Risk Profile Category Risk Rating
plete the following questionnaire to establish your Client's attitude towards taking risk. The risk category det People who know me would describe me as a cautious person. Select an option I generally look for safer investments, even if that means lower Select an option Select an option Usually it takes me a long time to make up my mind on investment decision:	inined will be used as a basis of comparison to ensure the final recommendation is suitable and eviden	Complete Manually
People who know me would describe me as a cautious person. Select an option I feel comfortable about investing in the stockmarket. Select an option I generally look for safer investments, even if that means lower Select an option Usually it takes me a long time to make up my mind on investment decidions.	7. I find investment matters easy to understand. Image: Select an option ▼ 8. I am willing to take substantial investment risk to earn substantial refurms. Image: Select an option ▼ 9. I've little or no experience of investing in stocks, shares, or	Rid Potile Calegory Rik Rating
Select an option I feel comfortable about investing in the stockmarket. I feel comfortable about investing in the stockmarket. I select an option I generally look for safer investments, even if that means lower returns. Select an option V Usually it takes me a long time to make up my mind on investment decidions.	I find investment matters easy to undersume. Select an option Select an option V I an willing to take substantial investment risk to earn substantial returns. Select an option V I've little or no experience of investing in stocks, shares, or	
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I feel comfortable about investing in the stockmarket. Select an option I generally look for safer investments, even if that means lower returns. Select an option Usually it takes me a long time to make up my mind on investment decidions.	8. I am willing to take substantial investment risk to earn substantial returns.	
Select an option	returns. Select an option 9. I've little or no experience of investing in stocks, shares, or	
I generally look for safer investments, even if that means lower returns. Select an option Usually it takes me a long time to make up my mind on investment decisions.	Select an option Ve little or no experience of investing in stocks, shares, or	
Select an option Usually it takes me a long time to make up my mind on investment decidions.	9. I've little or no experience of investing in stocks, shares, or	
Select an option v Usually it takes me a long time to make up my mind on investment decidions.		
Usually it takes me a long time to make up my mind on investment decisions.	investment funds.	
Usually it takes me a long time to make up my mind on investment decisions.	→ Select an option ▼	
decisions.		
	 I tend to be anxious about the investment decisions I've made. 	
Select an option	Select an option	
I associate the word "risk" with the idea of "opportunity".	11. I'd rather take my chances with higher risk investments than have to	
Select an option	save more.	
	→ Select an option ▼	
I generally prefer bank deposits to riskier investments.		
Select an option	 I'm not comfortable with the ups and downs of stockmarket investments. 	
	→ Select an option ▼	
	1777 i	



Set the Risk Category:

	Attitude to	o Risk Questior	nnaire	
Risk Category				
Select an Option				
Very Cautious				
Cautious				
Moderately Cautious (Low	End)			
Moderately Cautious (High	i End)			

Complete the Compliance Reason and 'Save'

Attitude to	Risk Questionnaire
*Risk Category	
Moderately Cautious (High End)	•
*Compliance Reason	
Test Compliance Reason	
	Cancel Save In

'Set as default'. This will allow you to view the Risk Questionnaire report and use the risk questionnaire in Illustrations.

Attitude To Risk Questionnaire ATR Questionnaire Nov 2021		Delete					
Contact Test Clients1							
E Details Kisk Questionnaire							
This questionnaire is completed and now locked, it can set as	default for the Client or a new Attitude to Risk Questionnaire can be created.						
1. People who know me would describe me as a cautious person.	7. I find investment matters easy to understand. → Select an option	Risk Profile Category Risk Rating Moderately Cautious (High End) 4					
2. I feel comfortable about investing in the stockmarket. → Select an option ▼	8. I am willing to take substantial investment risk to earn substantial returns.	Compliance Notes Test Compliance Reason					
3. I generally look for safer investments, even if that means lower returns.	Select an option V	20 Set as default for Client					
Select an option V	investment funds. → Select an option ▼	Set as default for Client					
decisions. ✓ Select an option ✓	10. I tend to be anxious about the investment decisions I've made. → Select an option						
5. I associate the word "risk" with the idea of "opportunity". → Select an option ▼	11. I'd rather take my chances with higher risk investments than have to save more.						
6. I generally prefer bank deposits to riskier investments.	Select an option						
Select an option	Select an option						
Attitude To Risk Questionnaire	Success!	Delete					
Contact							
Test Clients 1							
- Details / Risk Questionnaire	3 // Kell a Nov Z - 1810 C - 2019 C - 2018 // Kell a Nov Z - 2810 C - 29 9 C	— <u> </u>					
1. People who know me would describe me as a cautious person. → Select an option *	7. I find investment matters easy to understand. → Select an option	Risk Profile Category Risk Rating Moderately Cautious (High End) 4					
2. I feel comfortable about investing in the stockmarket.	8. I am willing to take substantial investment risk to earn substantial returns.	Compliance Notes Test Compliance Reason					
3. I generally look for safer investments, even if that means lower	Select an option						
Select an option	 I've little or no experience of investing in stocks, shares, or investment funds. Catest as orticing 						
 Usually it takes me a long time to make up my mind on investment decisions 	10. I tend to be anyiour about the investment decisions live made	¢3					
Select an option	Select an option						
5. I associate the word "risk" with the idea of "opportunity".	11. I'd rather take my chances with higher risk investments than have to save more.						
6. I generally prefer bank deposits to riskier investments.	Select an option						
→ Select an option ▼	12. I'm not comfortable with the ups and downs of stockmarket investments.						
	Select an option						