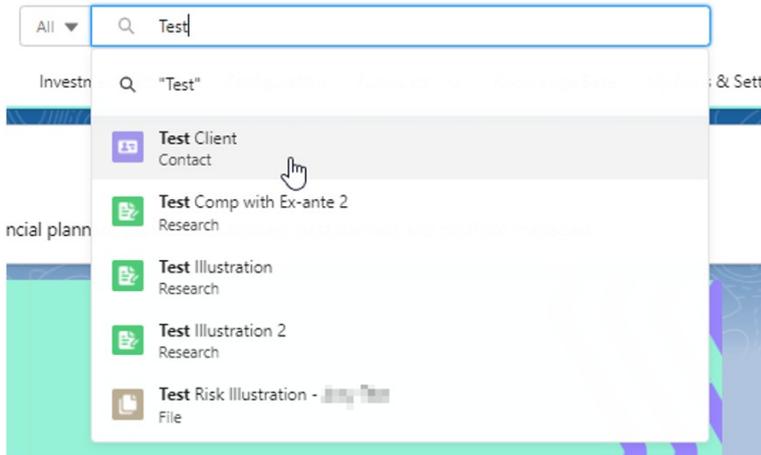


Setting Attitude to Risk Manually

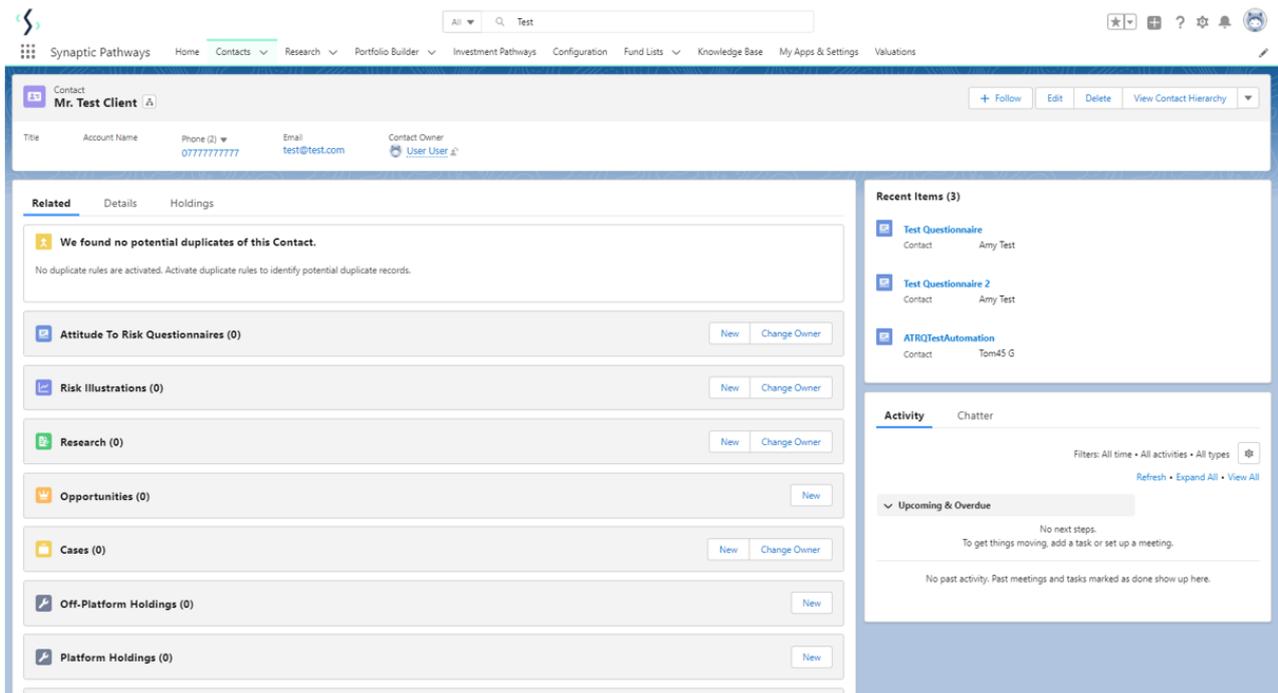
Last Modified on 25/05/2022 4:53 pm BST

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:



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 Owner

User User

Cancel Save & New Save

✓ Attitude To Risk Questionnaire "ATR Questionnaire" 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:

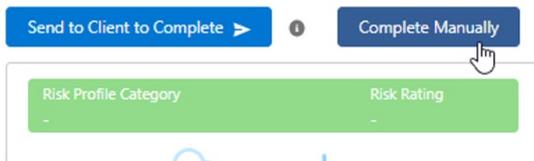
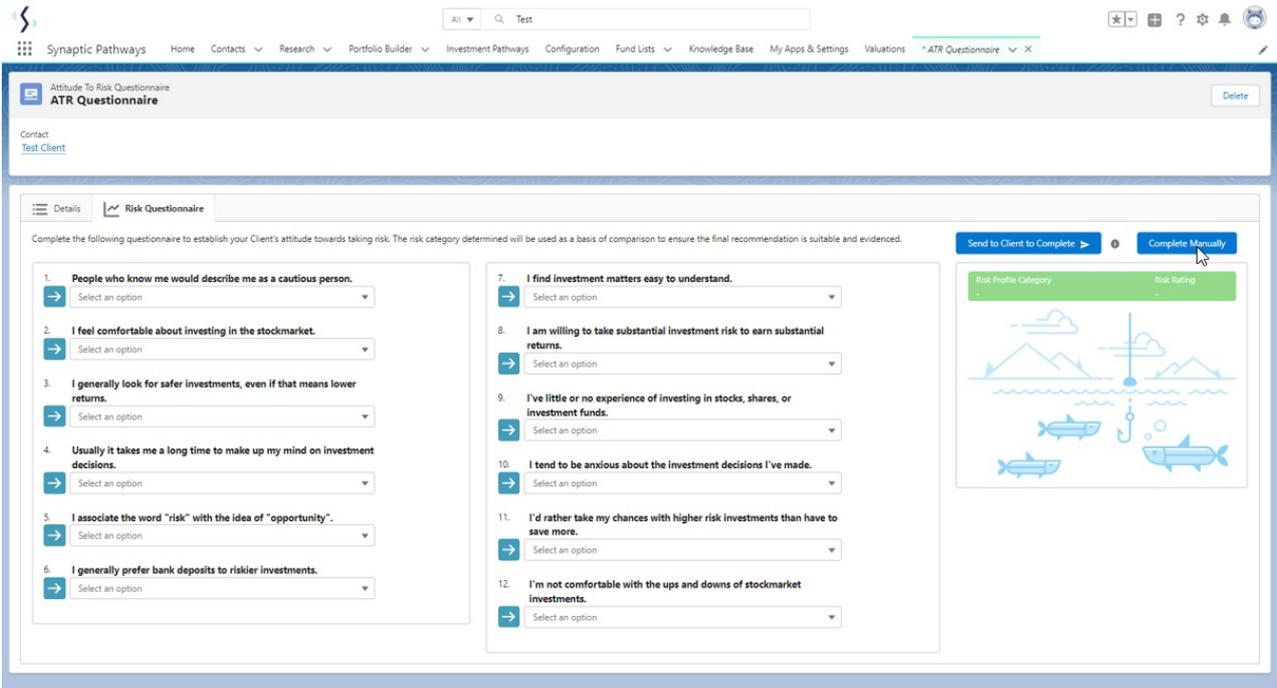
Attitude To Risk Questionnaires (1) New Change Owner

1 Item • Sorted by Default • Updated a few seconds ago

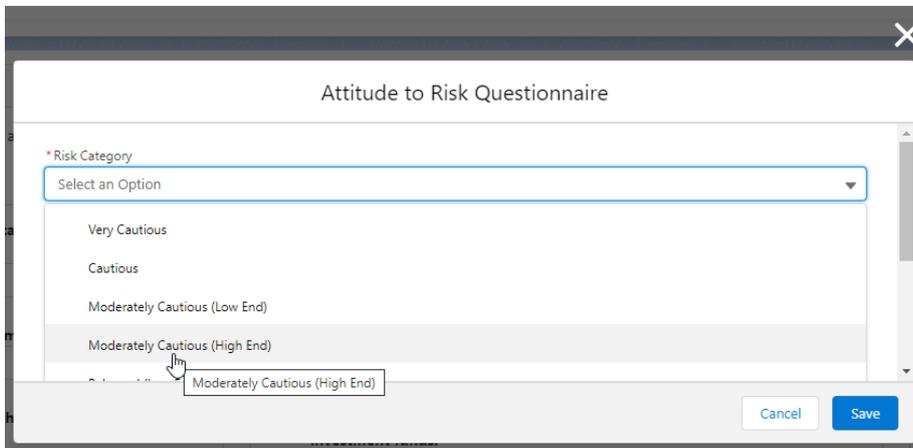
<input type="checkbox"/>	Risk Questionnaire	Contact?	Risk Categ...	Risk Rating	Default ↑
1	<input type="checkbox"/> ATR Questionnaire	<input type="checkbox"/>			

ATR Questionnaire
Contact: Test Client

Click 'Complete Manually'



Set the Risk Category:



Complete the Compliance Reason and 'Save'

Attitude to Risk Questionnaire

* Risk Category
 Moderately Cautious (High End) ▼

* Compliance Reason
 Test Compliance Reason

'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

Details | Risk 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.**
 Select an option ▼
2. **I feel comfortable about investing in the stockmarket.**
 Select an option ▼
3. **I generally look for safer investments, even if that means lower returns.**
 Select an option ▼
4. **Usually it takes me a long time to make up my mind on investment decisions.**
 Select an option ▼
5. **I associate the word "risk" with the idea of "opportunity".**
 Select an option ▼
6. **I generally prefer bank deposits to riskier investments.**
 Select an option ▼

7. **I find investment matters easy to understand.**
 Select an option ▼
8. **I am willing to take substantial investment risk to earn substantial returns.**
 Select an option ▼
9. **I've little or no experience of investing in stocks, shares, or investment funds.**
 Select an option ▼
10. **I tend to be anxious about the investment decisions I've made.**
 Select an option ▼
11. **I'd rather take my chances with higher risk investments than have to save more.**
 Select an option ▼
12. **I'm not comfortable with the ups and downs of stockmarket investments.**
 Select an option ▼

Risk Profile Category: **Moderately Cautious (High End)** Risk Rating: **4**

Compliance Notes
 Test Compliance Reason

Attitude To Risk Questionnaire
ATR Questionnaire Nov 2021 Delete

Contact
 Test Clients1

Details | Risk Questionnaire | Report

Success! Questionnaire is set as default for the client

1. **People who know me would describe me as a cautious person.**
 Select an option ▼
2. **I feel comfortable about investing in the stockmarket.**
 Select an option ▼
3. **I generally look for safer investments, even if that means lower returns.**
 Select an option ▼
4. **Usually it takes me a long time to make up my mind on investment decisions.**
 Select an option ▼
5. **I associate the word "risk" with the idea of "opportunity".**
 Select an option ▼
6. **I generally prefer bank deposits to riskier investments.**
 Select an option ▼

7. **I find investment matters easy to understand.**
 Select an option ▼
8. **I am willing to take substantial investment risk to earn substantial returns.**
 Select an option ▼
9. **I've little or no experience of investing in stocks, shares, or investment funds.**
 Select an option ▼
10. **I tend to be anxious about the investment decisions I've made.**
 Select an option ▼
11. **I'd rather take my chances with higher risk investments than have to save more.**
 Select an option ▼
12. **I'm not comfortable with the ups and downs of stockmarket investments.**
 Select an option ▼

Risk Profile Category: **Moderately Cautious (High End)** Risk Rating: **4**

Compliance Notes
 Test Compliance Reason