

# 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 shows a web application interface for 'Client Check-In'. At the top, there is a navigation menu with items like 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Generic Funds', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. A search bar is also present. Below the navigation, the main content area is titled 'Research: Susanna Comparison w/ Ex-ante'. It features a breadcrumb trail: 'Client Susanna West' > 'Description Test Description Text' > 'Illustration Type Whole of Market' > 'Segment Name' > 'Policy Type'. A progress bar at the top of the main area shows 'Client Check-In' as the current step, with 'Report' as the next step. On the left, a box titled 'What's Shown Here...' contains the instruction: 'Add commentary for each section to evidence that the clients attitude to risk, knowledge & experience and personal circumstances have been assessed.' The main content area is divided into five sections, each with a blue header and a white body containing a declaration and a form for commentary:

- 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](#)