

# Ex-Ante - 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 within a software application. At the top, there is a navigation bar with various menu items 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. Below the navigation, the main content area is titled 'Test Illustration Apr22' and includes a 'Convert to Holding' button. A progress bar at the top of the main area shows 'Research' (completed), 'Client Check-in' (current step), and 'Report' (pending). A 'Mark Status as Complete' button is also visible. The main content area is divided into several sections, each with a blue header and a text input field with a rich text editor toolbar. The sections are: 'Attitude to Risk' (Declaration of Attitude to Risk), 'Knowledge & Experience' (Declaration of Knowledge & Experience), 'Personal Circumstances' (Declaration of Personal Circumstances), 'Tolerance for Loss' (Declaration of Tolerance for Loss), and 'Capacity for Loss' (Declaration of Capacity for Loss). Each section includes a prompt to provide details to evidence suitability. 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.