

# Client Check-in - CIP

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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 - CIP' interface. At the top, there is a navigation menu with options 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. The main header shows 'Susanna Comparison w/Ex-ante CIP' with a 'Convert to Holding' button. Below this, there are tabs for 'Client', 'Description', 'Illustration Type', 'Segment Name', and 'Policy Type'. The 'Client' tab is active, showing 'Susanna West'. A progress bar at the top indicates the current step is 'Client Check-in', with 'Report' as the next step. A 'Mark Status as Complete' button is also visible. On the left, a 'What's Shown Here...' box provides instructions: '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 contains several sections, each with a 'Declaration' 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). At the bottom, 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'. A mouse cursor is pointing at the 'Continue to Report' button.