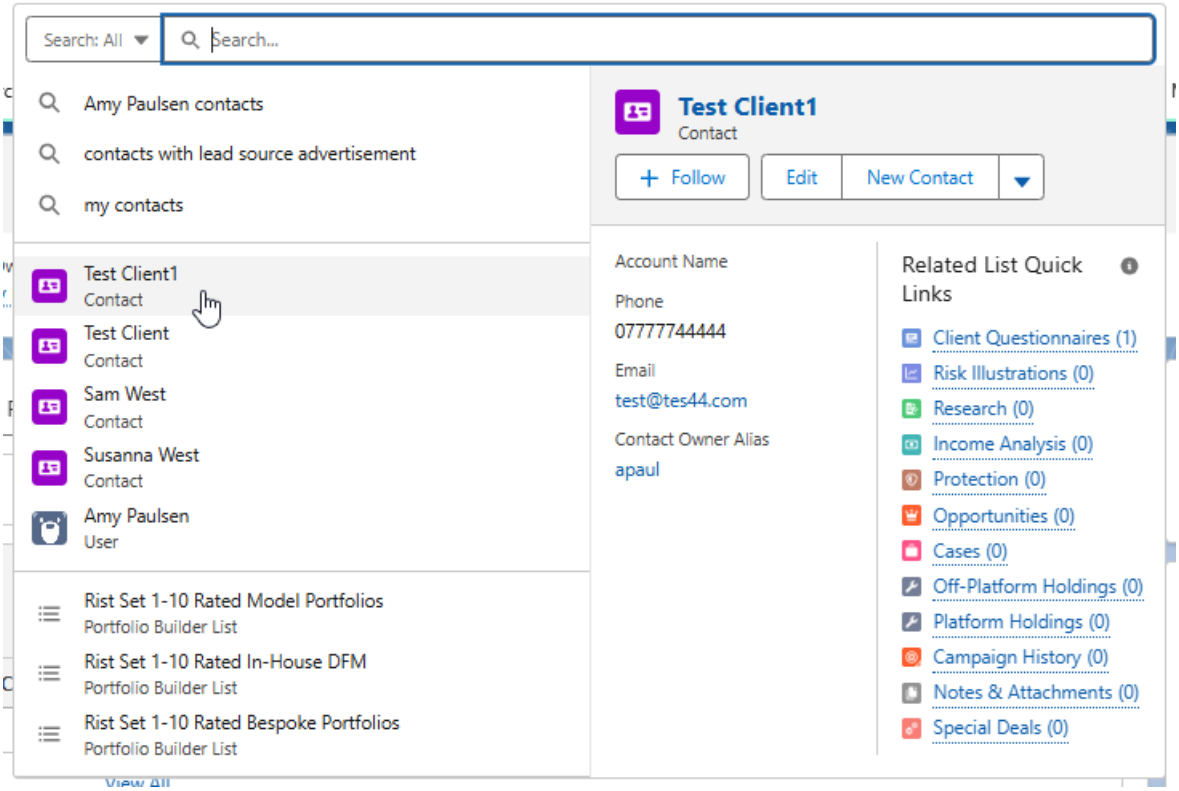
Creating an Attitude to Risk Questionnaire on behalf of your client

15/04/2025 3:41 pm BST

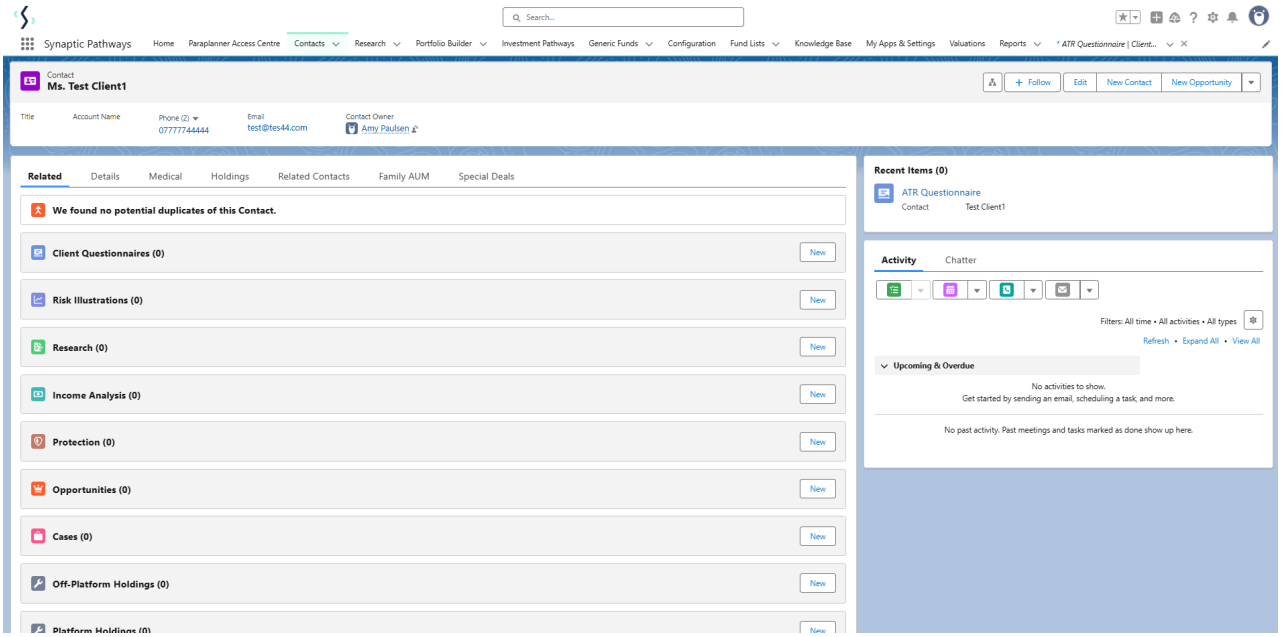
If you have completed the questionnaire with your client and would like to complete the questions manually, follow the steps below:

Create a new contact or find an existing contact record.

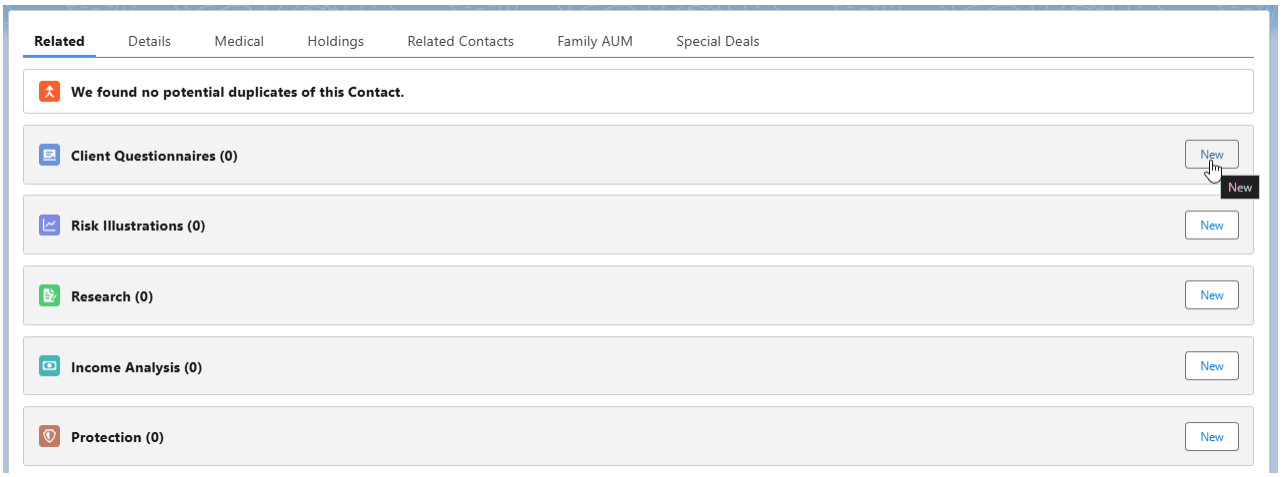
In this example, I will search for a contact called 'Test Client':



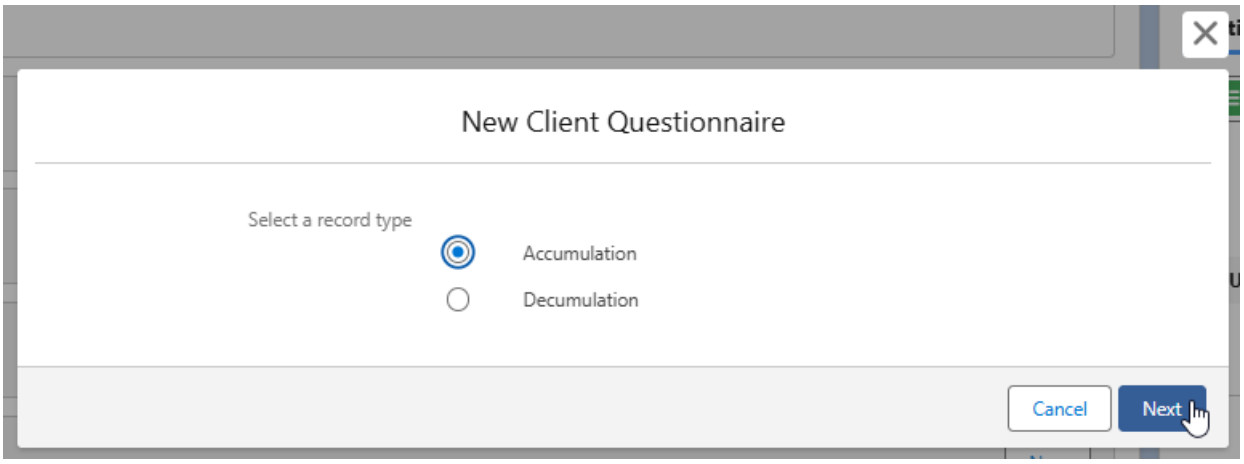
This will load up their contact record:



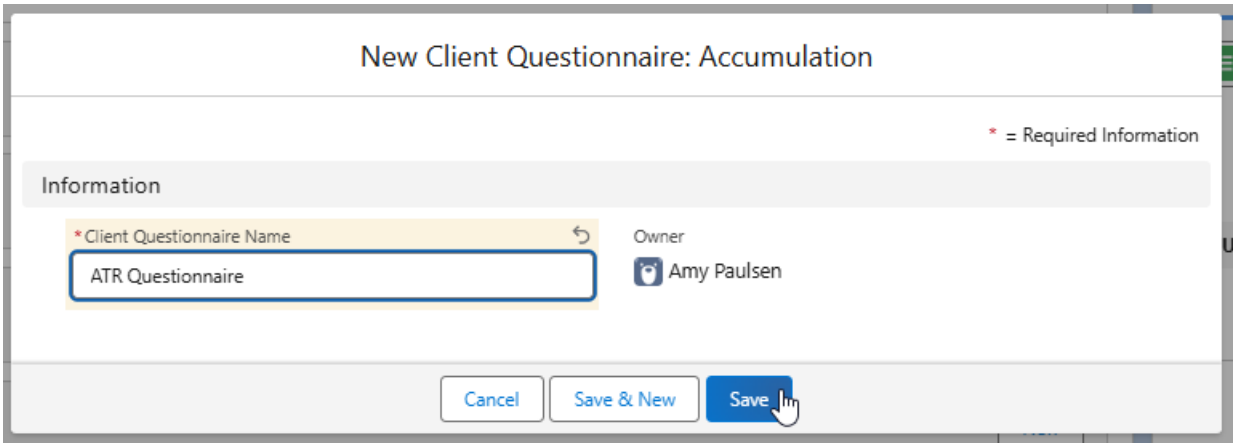
To create an attitude to risk questionnaire, click **New** next to **Client Questionnaires**

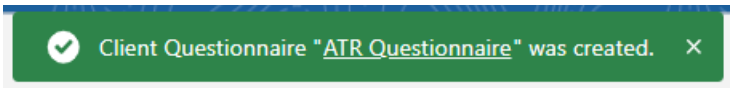


Select **Accumulation** or **Decumulation**

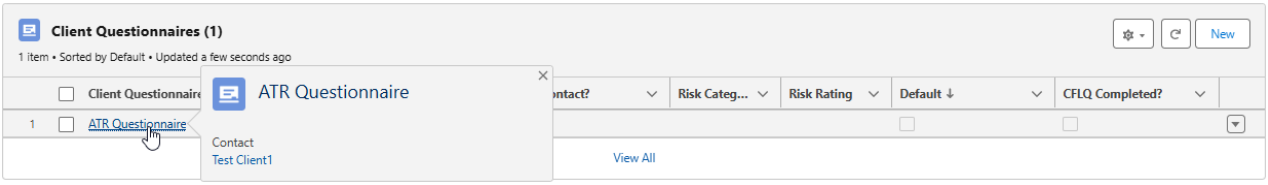


Enter the questionnaire name and click **Save**

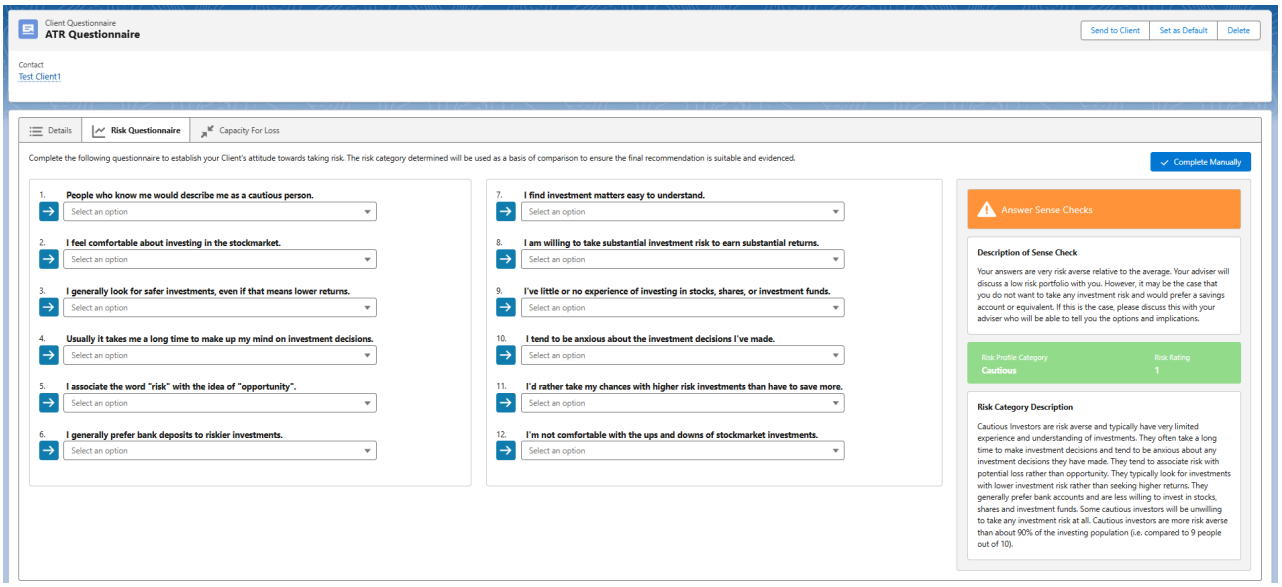




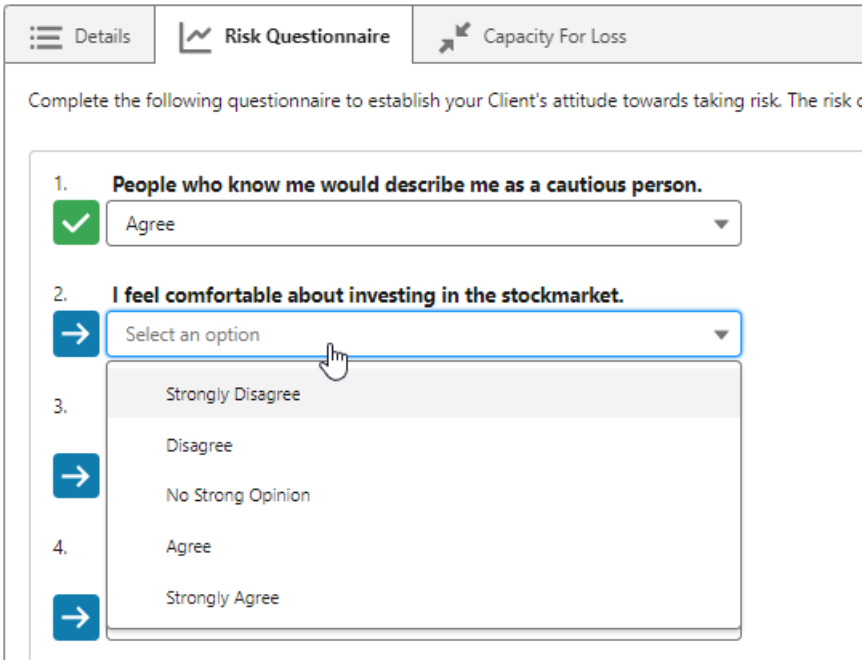
This will take you back to the contact record. To complete the questionnaire or send to the client to complete, click on the name of the questionnaire:



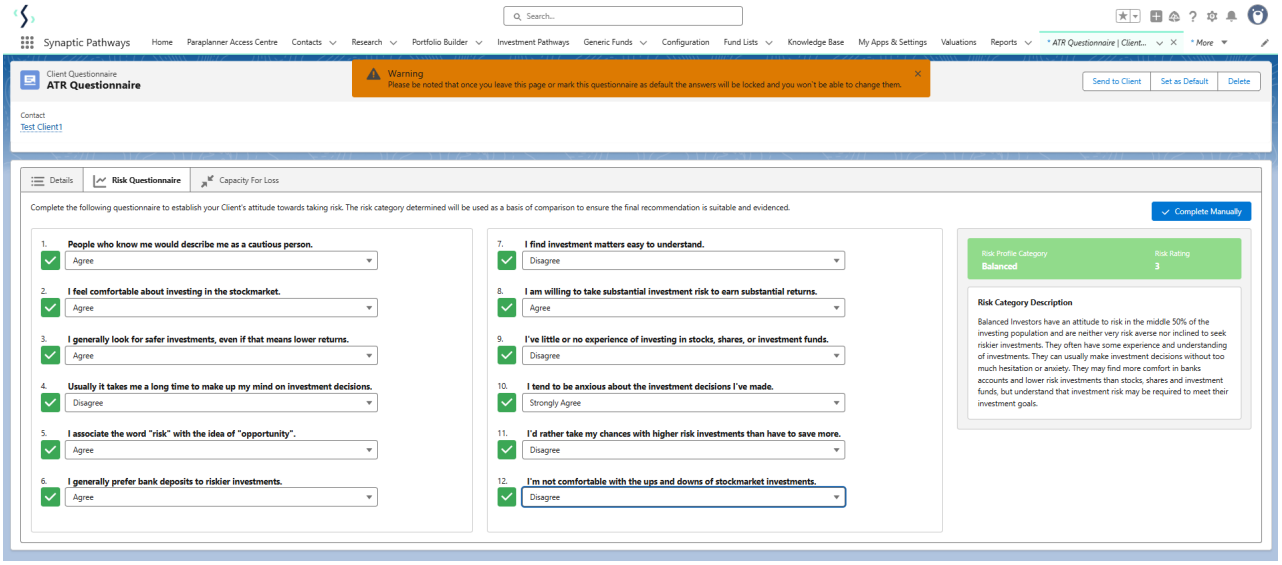
Complete the questions using the drop down fields:



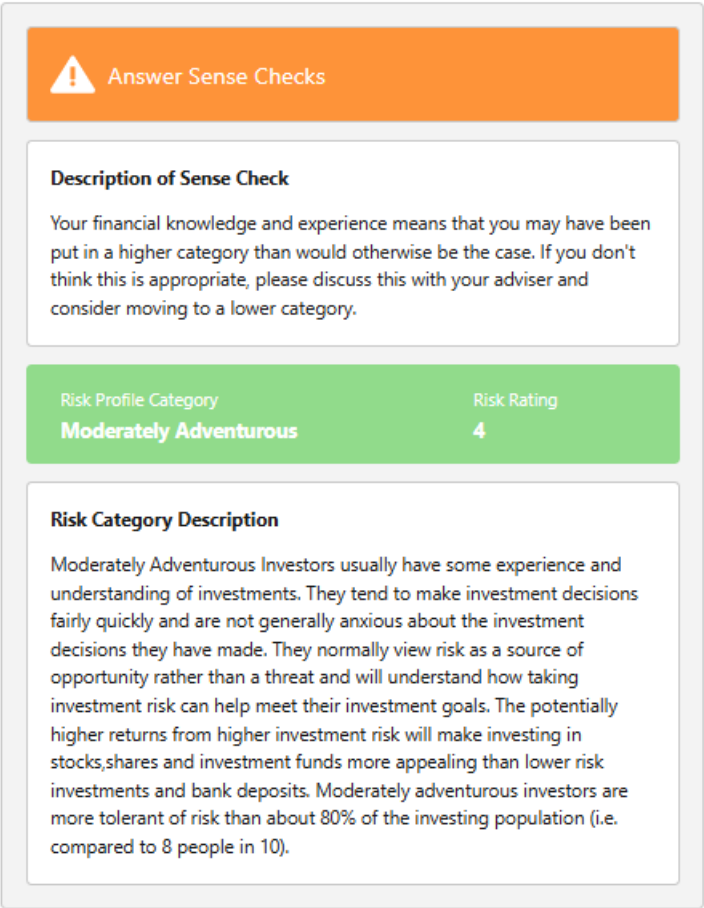
As you answer the questions, you will see the blue arrow change to a green tick:



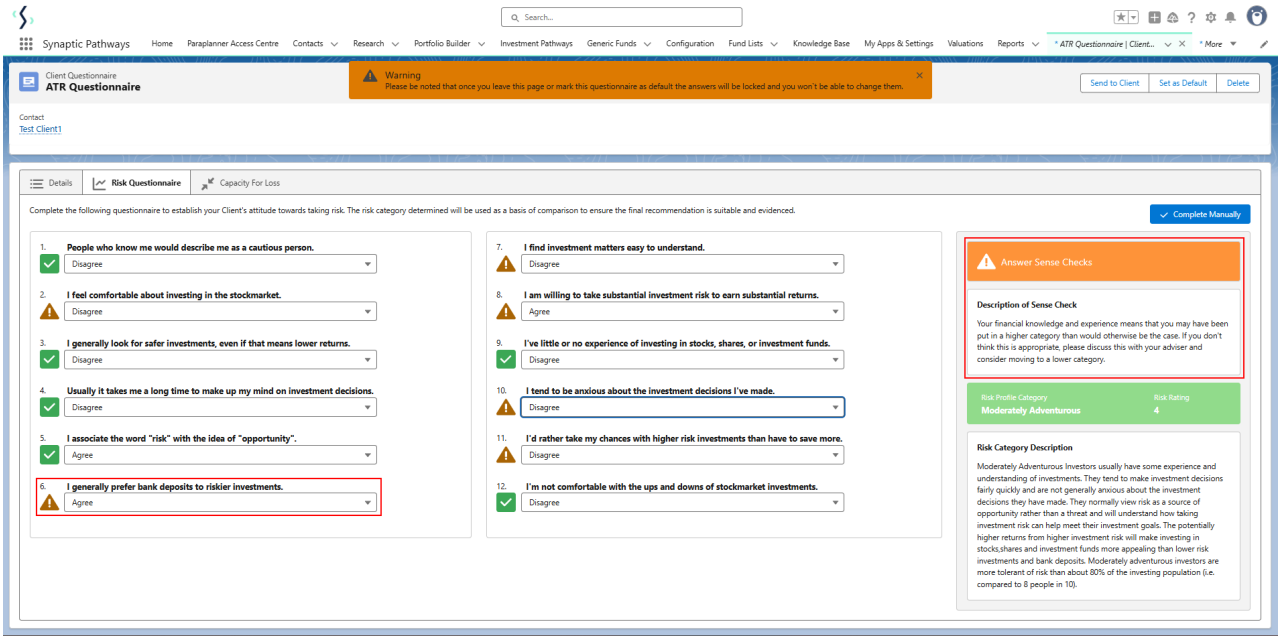
Once all questions are complete, the risk rating will appear on the left side of the screen.



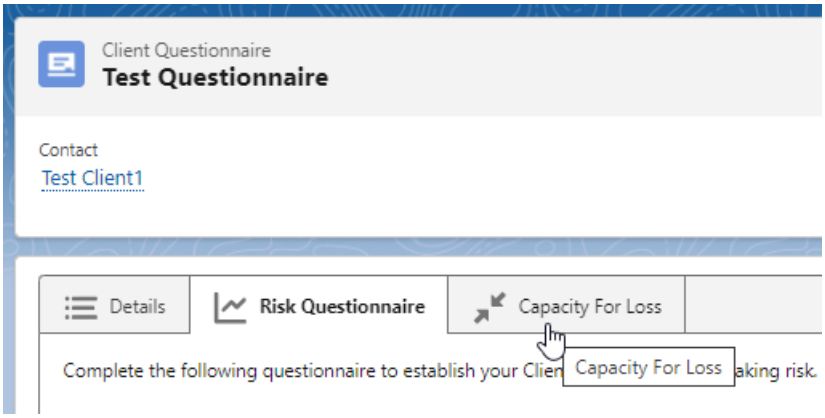
In the example below, a sense check has flagged up to say the client has answered the questions very risk adverse relative to the average:

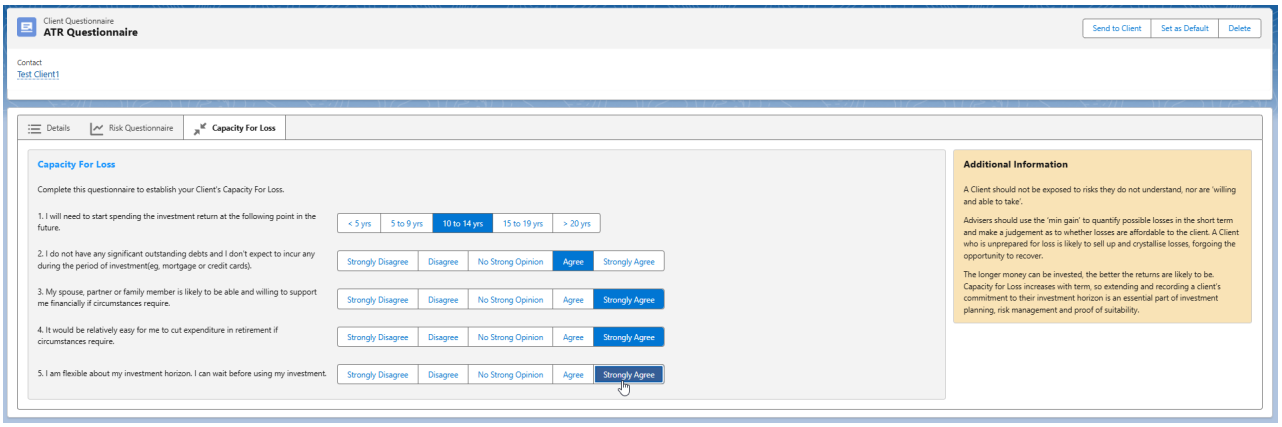


Also, any questions that need to be reviewed will flag up with a warning sign and a sense check:

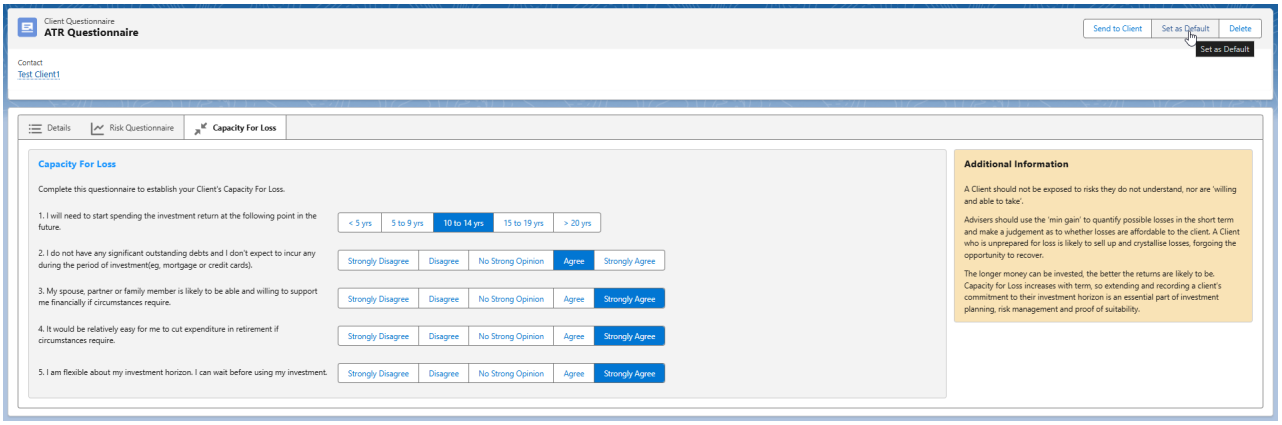


Click into the Capacity for loss tab to complete the questionnaire:

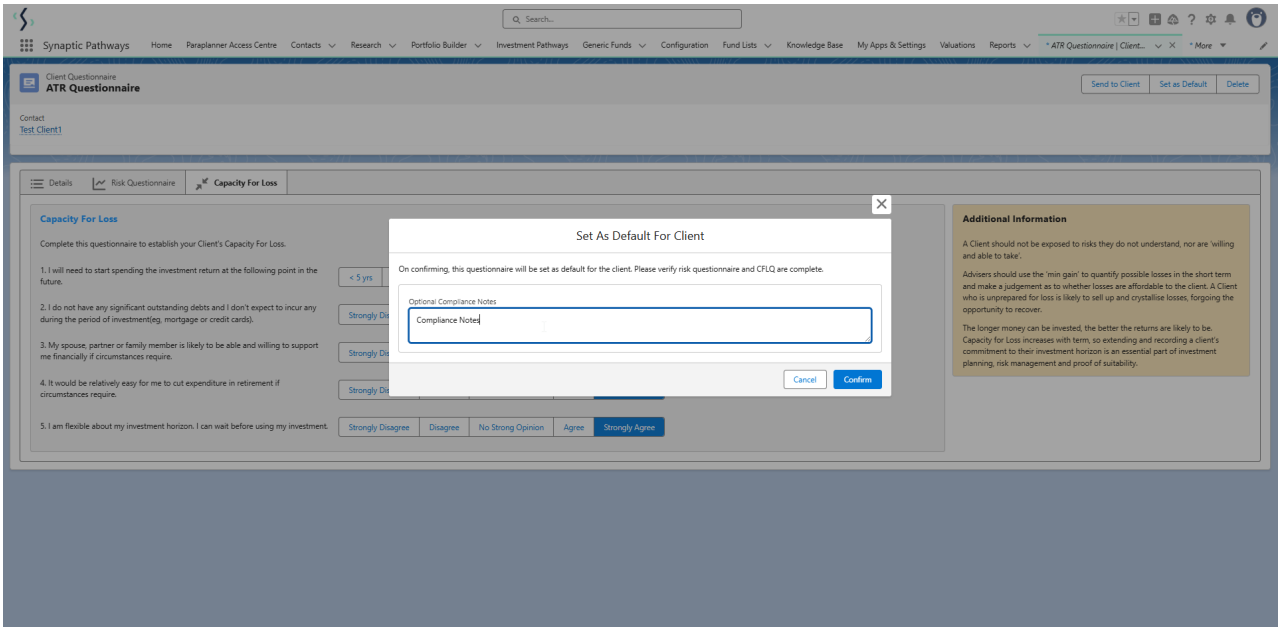


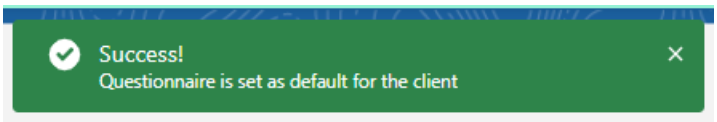


When the questionnaire is complete, click 'Set as default' to mark as complete. This will ensure the risk rating & capacity for loss pulls through to any research you create for the client:

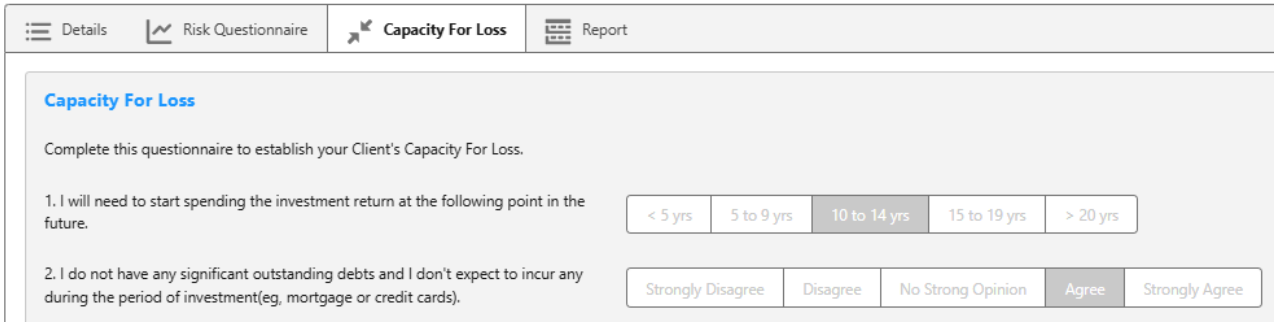


Optional Compliance Notes can be added:



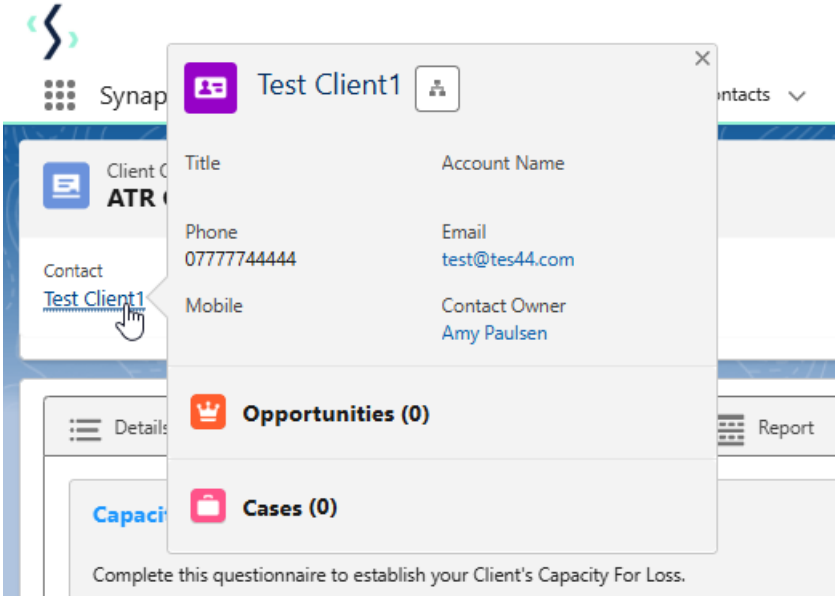
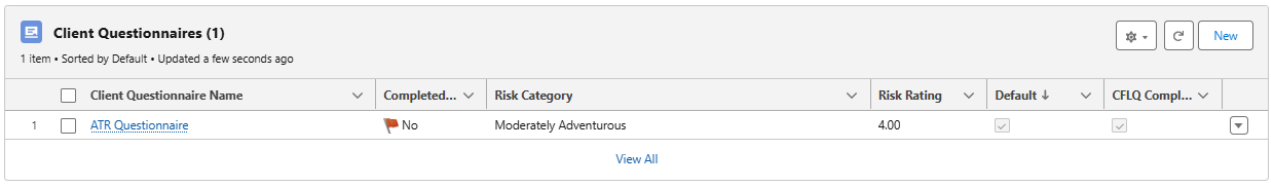


Once set to default, the Report tab will appear:



See article - Attitude to Risk Questionnaire Report

Once done, navigate back to the contact record:



The questionnaire now shows as complete and the default is set. The completed by contact is set to 'No' as it was manually entered and not completed by the client: