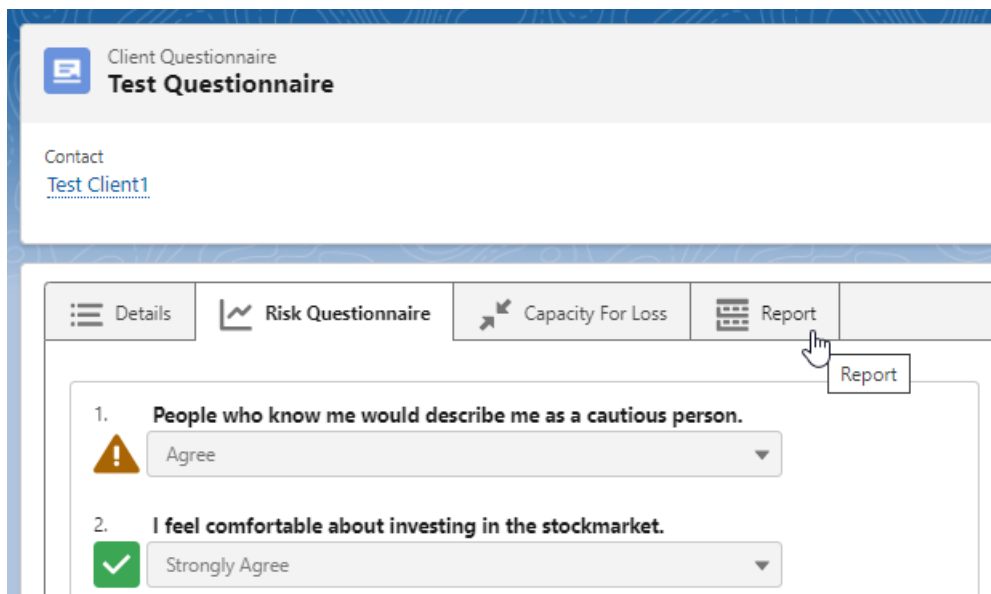


# Attitude to Risk Questionnaire Report

Last Modified on 13/02/2024 3:34 pm GMT

This article is a continuation of articles [Creating an Attitude to Risk Questionnaire on behalf of your client](#) & [Sending an Attitude to Risk Questionnaire to your client to complete](#)

Once an Attitude to Risk Questionnaire has been reviewed and set to default for the client, the Report tab will appear:



The report will include the following:

- Client Details
- Risk Profile Summary
- Target Risk Category Performance Comparison
- Compliance Notes
- Previous Risk Profiles (listed and shown within a graph)
- Questionnaire questions & answers
- Sense Checks
- Capacity for loss questions and answers

Client Questionnaire  
Test Questionnaire

[Send to Client](#)
[Set as Default](#)
[Delete](#)

[Contact Test Client1](#)

**Details** | Risk Questionnaire | Capacity For Loss | **Report**

[Download Report](#)

Prepared For: Test Client1 | Date of Birth: 11th October 2080

**Risk Profile Summary**

Risk Profile Category: Moderately Adventurous

Risk Rating: 4

Risk Category Description: Moderately Adventurous Investors usually have some experience and understanding of investments. They tend to make investment decisions fairly quickly and are not generally anxious about the investment decisions they have made. They normally view risk as a source of opportunity rather than a threat and will understand how taking investment risk can help meet their investment goals. The potentially higher returns from higher investment risk will make investing in stocks, shares and investment funds more appealing than lower risk investments and bank deposits. Moderately adventurous investors are more tolerant of risk than about 80% of the investing population (i.e. compared to 8 people in 10).

Compliance Notes

**Target Risk Category Performance Comparison**

The chart compares the client target risk category with those immediately adjacent. The table contains all risk categories and boundaries; the 'min. gain' indicates the potential loss for an investment in the 'worst year' of the term. It is equivalent to the 5% worst outcomes (or 1 in 20) from an investment of £10,000 over a 10 year term.

Risk Category	Boundary	Min Gain	Mean Gain	Max Gain
Cautious	-7.5	-7.5	6.28	18.92
Moderately Cautious	-12.5	-12.5	7.23	24.53
Balanced	-17.5	-17.5	7.9	28.78
Moderately Adventurous	-22.5	-22.5	8.69	34.9
Adventurous	-27.5	-27.5	8.94	38.34

**Risk Profile History**

Date	Risk Set	Risk Category	Risk Rating
17 Nov 2023	Synaptic 1 to 5	Moderately Adventurous	4

**Chart of Clients Historical Risk Categories**

**Risk Questionnaire Answers for the Current Risk Category**

Question Number	Question	Answer
1	People who know me would describe me as a cautious person.	Agree
2	I feel comfortable about investing in the stockmarket.	Strongly Agree
3	I generally look for safer investments, even if that means lower returns.	Disagree
4	Usually it takes me a long time to make up my mind on investment decisions.	Agree
5	I associate the word "risk" with the idea of "opportunity".	Disagree
6	I generally prefer bank deposits to riskier investments.	Disagree
7	I find investment matters easy to understand.	Agree
8	I am willing to take substantial investment risk to earn substantial returns.	Agree
9	I've little or no experience of investing in stocks, shares, or investment funds.	Agree
10	I tend to be anxious about the investment decisions I've made.	Disagree
11	I'd rather take my chances with higher risk investments than have to save more.	Disagree
12	I'm not comfortable with the ups and downs of stockmarket investments.	Disagree

Table 2 Risk Questionnaire Table

**Sense Check Alert Notice**

Your financial knowledge and experience means that you may have been put in a higher category than would otherwise be the case. If you don't think this is appropriate, please discuss this with your adviser and consider moving to a lower category.

**Capacity For Loss Questions and Answers**

Question Number	Question	Answer
1	My Client doesn't have any significant outstanding debts and doesn't expect to incur any during the period of the investment(s), mortgage or credit cards).	Strongly Agree
2	My Client's spouse, partner or family member is likely to be able and willing to support them financially if circumstances require.	Agree
3	It would be relatively easy for my Client to cut expenditure in retirement if circumstances require.	Agree
4	My Client is flexible about their investment horizon. They could wait before using their investment.	Strongly Agree

Table 3 Capacity For Loss Questionnaire table

The report can be downloaded at the top right of the screen:

Download Report

Report PDF Download

Prepared For

Test Client1

Date of Birth 11th October 2080

Risk Profile Summary

Risk Profile Category Moderately Adventurous

Risk Rating 4

Risk Category Description Moderately Adventurous Investors usually have some experience and understanding of investments. They tend to make investment decisions fairly quickly and are not generally anxious about the investment decisions they have made. They normally view risk as a source of opportunity rather than a threat and will understand how taking

Target Risk Category Performance Comparison

