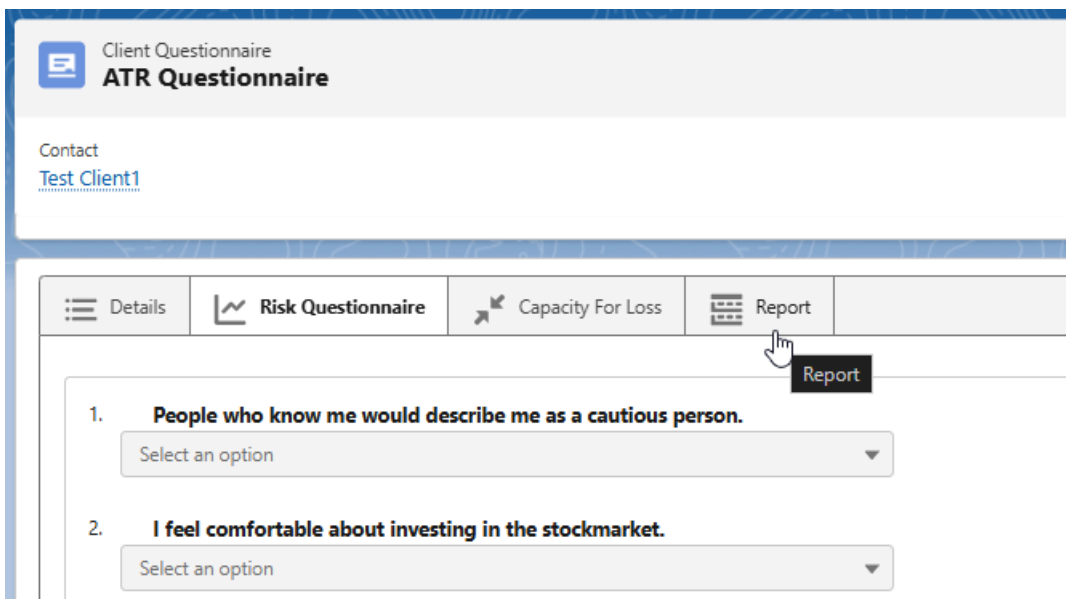


Attitude to Risk Questionnaire Report

15/04/2025 3:59 pm BST

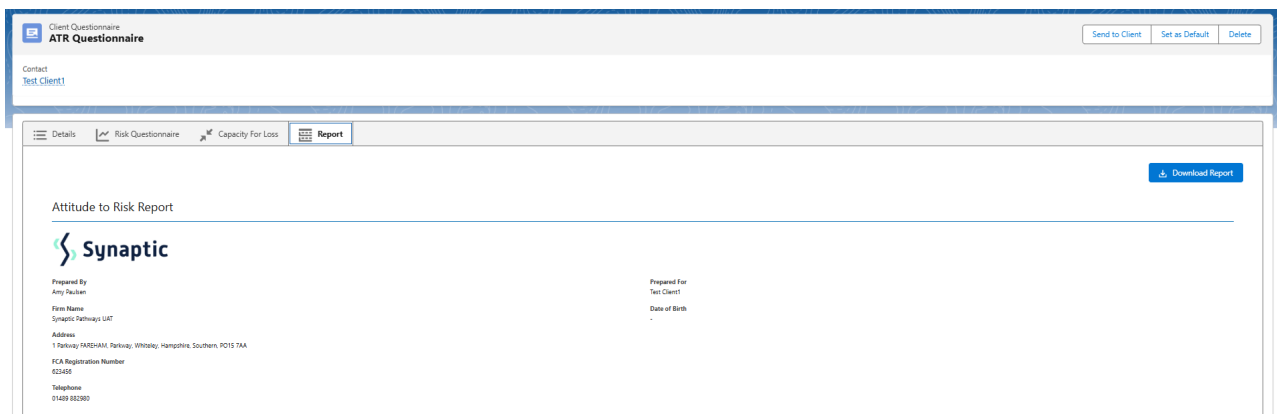
This article is a continuation of articles [Creating an Attitude to Risk Questionnaire on behalf of your client](#) & [Sending an Attitude to Risk Questionnaire to your client to complete](#)

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



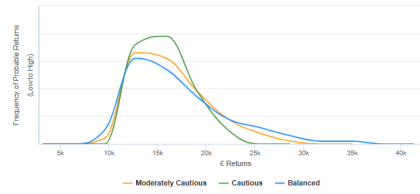
RISK PROFILE SUMMARY

Risk Profile Category: Moderately Cautious
 Risk Rating: 2
 Risk Category Description: Moderately Cautious investors have fairly limited experience and understanding of investments. They often take a long time to make investment decisions and tend to be ambivalent about any investment decisions they have made. They are inclined to associate risk with potential loss rather than opportunity. They may prefer bank accounts or lower risk investments to higher returning but riskier investments such as stocks, shares and investment funds. However, they may be willing to take some risk, once the relationship between risk and higher returns has been explained to them. Moderately Cautious investors are more risk averse than about 70% of the investing population (i.e. compared to 7 people out of 10).

COMPLIANCE NOTES

Test 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	-8.5	-8.5	6.05	18.52
Moderately Cautious	-11.5	-11.5	7.15	24.79
Balanced	-16.5	-16.5	7.75	28.74
Moderately Adventurous	-21.5	-21.5	8.21	32.71
Adventurous	-24	-24	8.83	40.28

RISK PROFILE HISTORY

Risk Rating Profile Over Time

Date	Risk Test	Risk Category	Risk Rating
15 Apr 2025	Synaptic 1 to 5	Moderately Cautious	2

Table 1 - Historical Risk Rating



Clients Historical Risk Categories



RISK QUESTIONNAIRE ANSWERS FOR THE CURRENT RISK CATEGORY

Not Applicable due to client risk category being set manually.

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

Details Risk Questionnaire Capacity For Loss Report

Download Report

Report PDF Download

Attitude to Risk Report

Synaptic

Prepared By: Amy Paulsen
 Prepared For: Test Client
 Firm Name: Synaptic Pathways UK
 Date of Birth: .
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