

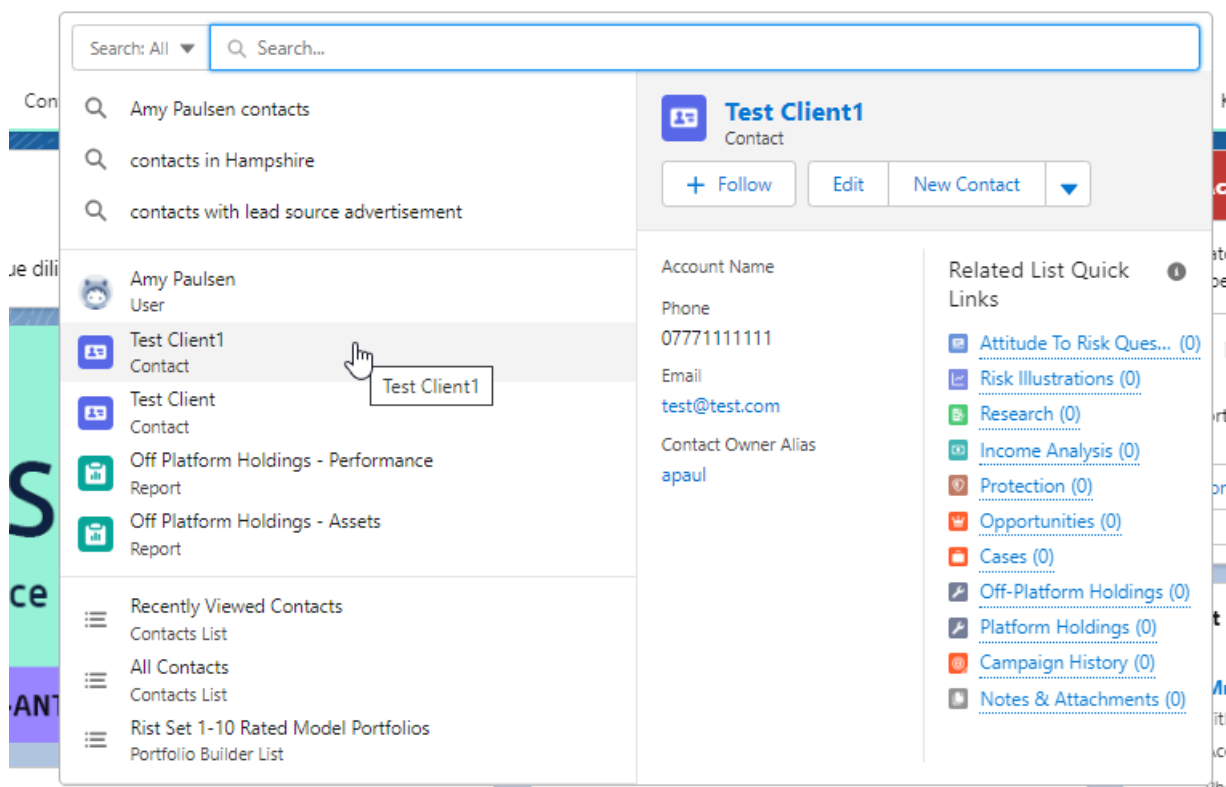
Creating a new Attitude to Risk Questionnaire

Last Modified on 13/02/2024 3:35 pm GMT

You can create an attitude to risk questionnaire in two ways, either by completing the questions on behalf of your client, or sending them the questionnaire by email to complete themselves.

To create an attitude to risk questionnaire, create a new contact or find an existing contact record.

In this example, I will search for a contact called 'Test Client 1':



This will load up their contact record:

Synaptic Pathways Home Paraplanner Access Centre **Contacts** Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Contact **Mr. Test Client1** [A] + Follow Edit New Contact New Opportunity

Title Account Name Phone (2) 07771111111 Email test@test.com Contact Owner Amy Paulsen

Related Details Medical Holdings Related Contacts Family AUM

We found no potential duplicates of this Contact.

- Attitude To Risk Questionnaires (0)** [New]
- Risk Illustrations (0)** [New]
- Research (0)** [New]
- Income Analysis (0)** [New]
- Protection (0)** [New]
- Opportunities (0)** [New]
- Cases (0)** [New]
- Off-Platform Holdings (0)** [New]

Recent Items (3)

- Test Questionnaire** Contact Test Client
- Test Questionnaire** Contact Susanna West
- Test** Contact Susanna West

Activity Chatter

Filters: All time • All activities • All types [Filter Icon]

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

To create an attitude to risk questionnaire, click 'New' next to 'Attitude To Risk Questionnaire'

Related Details Medical Holdings Related Contacts Family AUM

We found no potential duplicates of this Contact.

- Attitude To Risk Questionnaires (0)** [New]
- Risk Illustrations (0)** [New]
- Research (0)** [New]
- Income Analysis (0)** [New]

Enter the questionnaire name and click 'Save':

New Attitude To Risk Questionnaire

* = Required Information

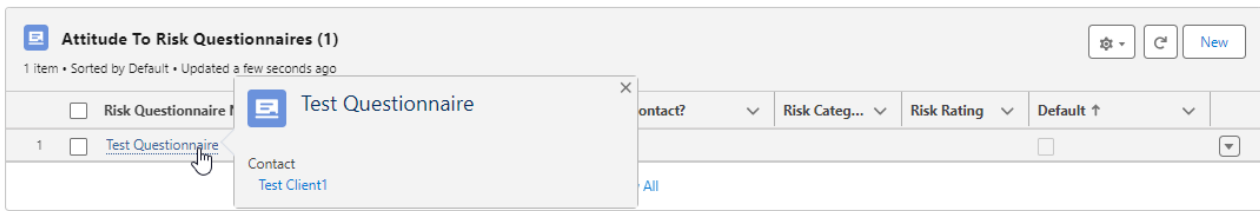
Information

* Risk Questionnaire Name [Test Questionnaire] Owner Amy Paulsen

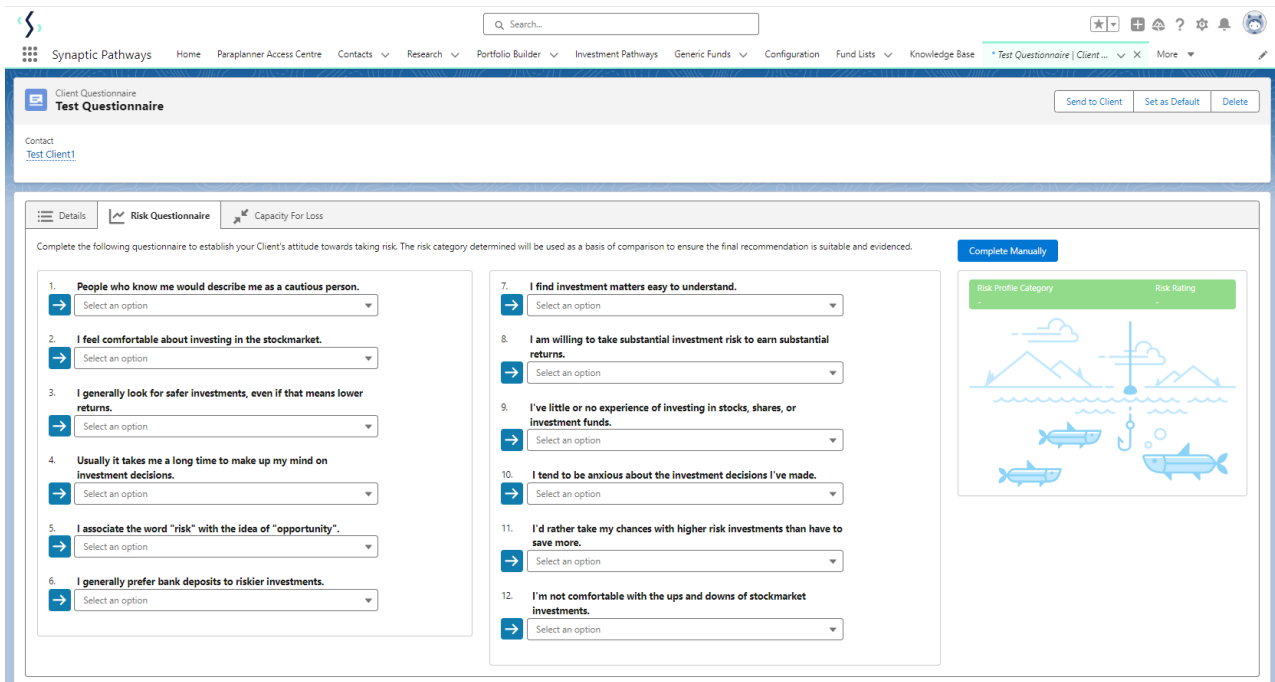
[Cancel] [Save & New] [Save]

✓ Attitude To Risk Questionnaire "Test Questionnaire" was created. ✕

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



Once within the questionnaire, you get a choice of sending the questionnaire to your client to complete, or complete the questions on behalf of your client.



The following articles cover how to complete the questionnaire manually and sending the questionnaire to a client:

[Creating an Attitude to Risk Questionnaire on behalf of your client](#)

[Sending an Attitude to Risk Questionnaire to your client to complete](#)