

Risk Illustrations

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

Illustrations are found within the Contact record:

The screenshot displays a CRM interface for a contact named Ms. Susanna West. The top navigation bar includes options like 'Follow', 'Edit', 'New Contact', and 'New Opportunity'. Below this, there are tabs for 'Related', 'Details', 'Medical', 'Holdings', 'Related Contacts', and 'Family AUM'. The main content area is divided into several sections:

- We found no potential duplicates of this Contact.**
- Client Questionnaires (2)**: A table with columns for Client Questionnaire Name, Completed..., Risk Category, Risk Rating, and Default. It lists two items: 'Test Questionnaire' (Moderately Adventurous (High End), Risk Rating 8) and 'Test' (Balanced (High End), Risk Rating 6).
- Risk Illustrations (1)**: This section is highlighted with a red box. It contains a table with columns for Illustration Name, Description of Objective, Target Risk C..., Term, and Review Date. It lists one item: 'Susan Risk Illustration' (Test Description, Term 10).
- Research (2)**: A table with columns for Illustration Name, Research Type, Description, Activity Due Date, Last Modified By, and Convert To Holding. It lists two items: 'Susan Test Research' (Comparison with Evante, Activity Due Date 18/10/2023, Last Modified By Amy Paulsen) and 'Susan Switch' (Switch, Last Modified By Amy Paulsen).
- Income Analysis (1)**: A table with columns for Goal Name, Income Re..., Goal Type, Holdings, Fund Value, Income So..., Review Date, and Convert To.

On the right side of the interface, there are two panels:

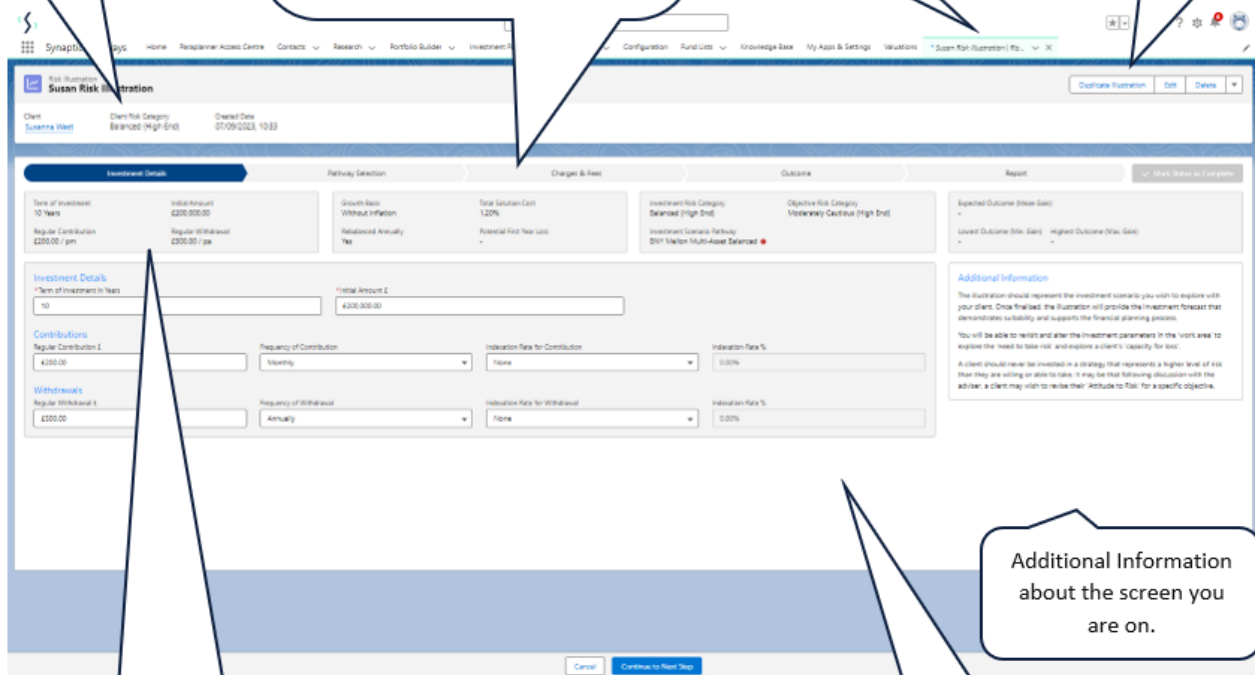
- Recent Items (3)**: Lists three 'Test Questionnaire' items.
- Activity Chatter**: Shows a list of activities with a filter set to 'All time • All activities • All types'. It includes an 'Upcoming & Overdue' section with the message: 'No activities to show. Get started by sending an email, scheduling a task, and more.' Below this, it states: 'No past activity. Past meetings and tasks marked as done show up here.'

If an Attitude to Risk questionnaire has been completed and set to default, the client's risk category will show here.

This is the progress bar. Complete the details in each screen and 'Continue to Next Step' at the bottom left. As you work your way through the screens, the bar will change to a green tick to show as completed. You can click back through these if you need to amend any information later in the journey.

Your Illustration will appear in the toolbar – allowing you to work on more than one task at a time.

The Illustration can be duplicated & the title & description edited. You can also delete the Illustration & change the owner to a colleague.



These tiles will populate as you enter details of the Illustration. This summary will be available throughout the journey to refer to.

Progress back and forth through the screens using these buttons.

As you complete Investment details, the tiles above will populate

Additional Information about the screen you are on.