

Risk Illustrations

15/04/2025 4:01 pm BST

Illustrations are found within the Contact record:

15

Contact

Ms. Susanna West

A

+ Follow

Edit

New Contact

New Opportunity

Title

Account Name

Phone (2) w

Email

Contact Owner

0755555555

Amy Paulsen

A

Related

Details

Medical

Holdings

Related Contacts

Family AUM

2

We found no potential duplicates of this Contact.

15

Client Questionnaires (2)

2 items • Sorted by Default • Updated a few seconds ago

⚙

🔍

New

<input type="checkbox"/>	Client Questionnaire Name	Completed...	Risk Category	Risk Rating	Default ↑
1	Test Questionnaire	Yes	Moderately Adventurous (High End)	8	<input type="checkbox"/>
2	Test	Yes	Balanced (High End)	6	<input checked="" type="checkbox"/>

[View All](#)

15

Risk Illustrations (1)

1 item • Updated a few seconds ago

⚙

🔍

New

<input type="checkbox"/>	Illustration Name	Description of Objective	Target Risk C...	Term	Review Date
1	Susan Risk Illustration	Test Description		10	<input type="checkbox"/>

[View All](#)

15

Research (2)

2 items • Updated a few seconds ago

⚙

🔍

New

<input type="checkbox"/>	Illustration Name	Research Type	Description	Activity Due Date	Last Modified By	Convert To Holding
1	Susan Test Research	Comparison with Ev-ante	Test Description	18/10/2023	Amy Paulsen	Convert To Holding
2	Susan Switch	Switch			Amy Paulsen	Convert To Holding

[View All](#)

15

Income Analysis (1)

1 item • Updated a few seconds ago

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New

<input type="checkbox"/>	Goal Name	Income Re...	Goal Type	Holdings	Fund Value	Income Se...	Review Date	Convert To
1	Test Income Analysis						24/03/2025	Proceed from 100% to 50%

Recent Items (3)

15

ATR Questionnaire

Contact

Test Client

15

Test Questionnaire

Contact

Test Client

15

Test Questionnaire

Contact

Susanna West

Activity

Chatter

📅

📄

📧

📱

📧

📱

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

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.

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.

The screenshot shows the 'Susan Risk Illustration' interface. At the top, a navigation bar includes 'Home', 'Responsible Access Centre', 'Contacts', 'Research', 'Portfolio Builder', and 'Investment'. Below this, a toolbar contains 'Duplicate Illustration', 'Edit', and 'Delete'. The main content area is divided into several sections: 'Investment Details' (Term of Investment: 10 Years, Initial Amount: £200,000.00, Regular Contribution: £200.00 / pm), 'Contributions' (Regular Contribution: £200.00), 'Withdrawals' (Regular Withdrawal: £200.00), 'Portfolio Selection' (Growth Basis: Without Inflation, Total Solution Cost: 1.20%, Potential First Year Costs: £200,000.00), 'Charges & Fees', 'Outcome' (Investment Risk Category: Balanced (High End), Objective Risk Category: Moderately Cautious (High End), Investment Scenario: Portfolio 50% Market Multi-Asset Balanced), and 'Report' (Expected Outcome (Best Case), Lowest Outcome (Mid Case), Highest Outcome (Worst Case)). A progress bar at the top indicates the current step. Callouts point to the 'Continue to Next Step' button, the progress bar, the 'Illustration' icon in the toolbar, and the 'Additional Information' section on the right.

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.