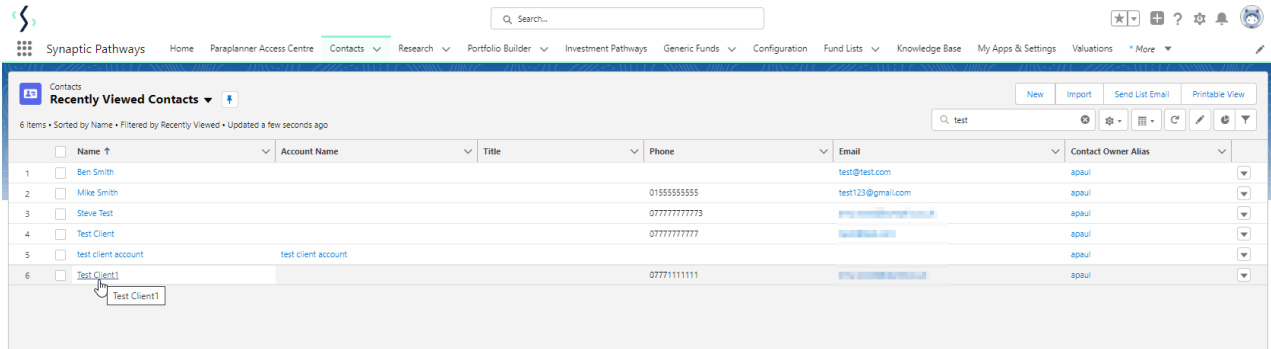


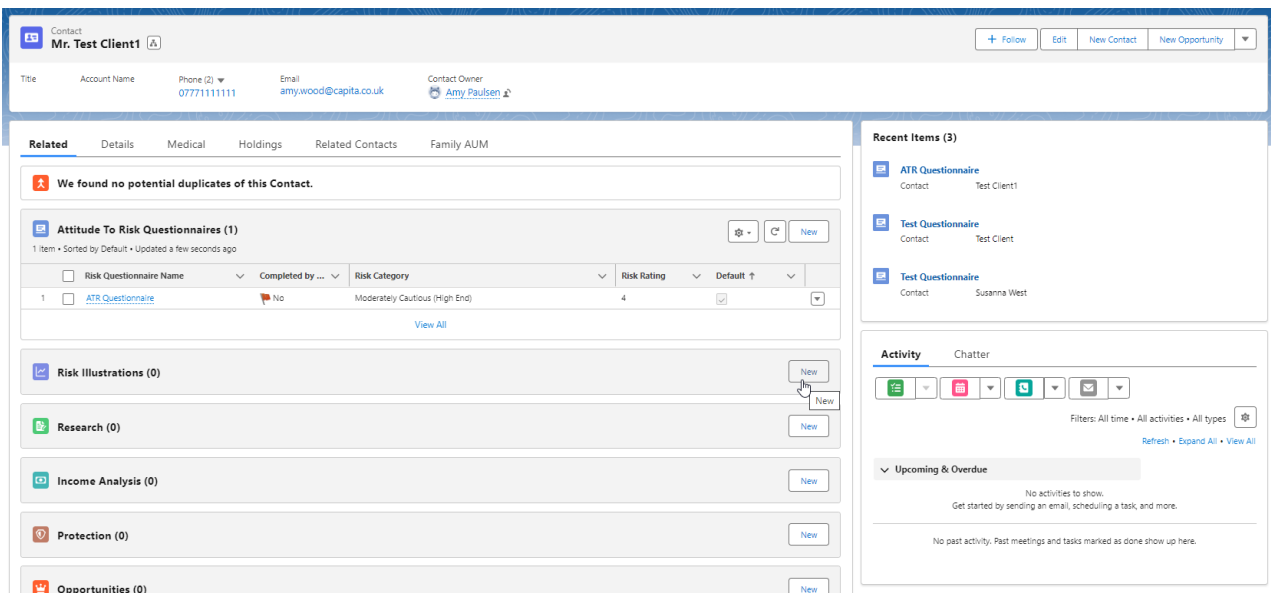
Risk Illustrations - Creating an Illustration

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

To create an illustration for a client, load up the client's contact record:



Click 'New' to create a new illustration:



Contacts Family AUM

New Risk Illustration

* = Required Information

Information

* Illustration Name ↶

Risk Illustration

Description of Objective

Cancel Save & New Save Save

✓ Risk Illustration "Risk Illustration" was created. ✕

Click back into the illustration by clicking on the Illustration name:

Illustrations (1)

1 Item • Updated a few seconds ago

	Illustration Name	Client	Client Risk Category
1	Test Illustration	Test Client	Balanced (Low End)

Test Illustration ✕

Client: Test Client Client Risk Category: Balanced (Low End)

Created Date: 01/03/2021, 14:38

For information on completing the Illustration, see below articles:

[Illustrations - Investment Details](#)

[Illustration - Pathway Selection](#)