Risk Illustrations - Creating an Illustration

15/04/2025 4:07 pm BST

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

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Click 'New' to create a new illustration:

Contact Ms. Test Client1	A + Follow Edit New Contact New Opportunity ▼
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Related Details Medical Holdings Related Contacts Family AUM Special Deals 3 We found no potential duplicates of this Contact. Special Deals Special Deals	Recent Items (1) ATR Questionnaire Contact Test Client1
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Complete Illustration Name, Description of Objective and the client questionnaire you would like to pull through to the illustration, Accumulation or Decumulation:

New Ris	k Illustration
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Click back into the illustration by clicking on the Illustration name:

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For information on completing the Illustration, see below articles:

Illustrations - Investment Details

Illustration - Pathway Selection