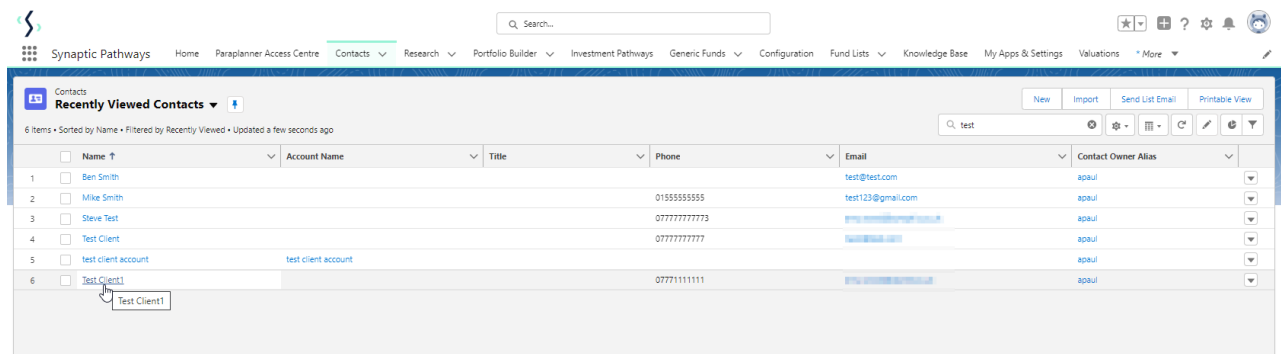


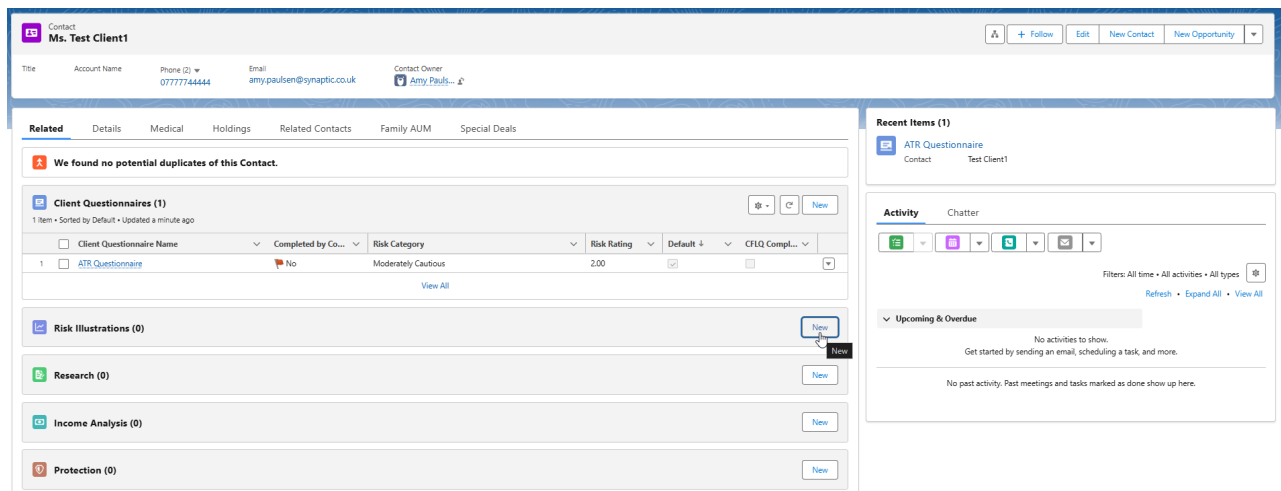
Risk Illustrations - Creating an Illustration

15/04/2025 4:07 pm BST

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



Click 'New' to create a new illustration:



Complete Illustration Name, Description of Objective and the client questionnaire you would like to pull through to the illustration, Accumulation or Decumulation:

X

New Risk Illustration

* = Required Information

Information

* Illustration Name ↶

Risk Illustration

Description of Objective

* Accumulation / Decumulation

Accumulation ▼

--None--

✓ Accumulation

Decumulation

Save & New
Save

✓ Risk Illustration "Risk Illustration" was created.
X

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

Risk Illustrations (1)

1 Item • Updated a few seconds ago

⚙ 🔄 New

Illustration Name	Description o...	Target Risk C...	Term	Review Date	
1 Risk Illustration	Client Test Client1	Client Risk Category Moderately Cautious			View All

Research (0)

New

For information on completing the Illustration, see below articles:

[Illustrations - Investment Details](#)

[Illustration - Pathway Selection](#)