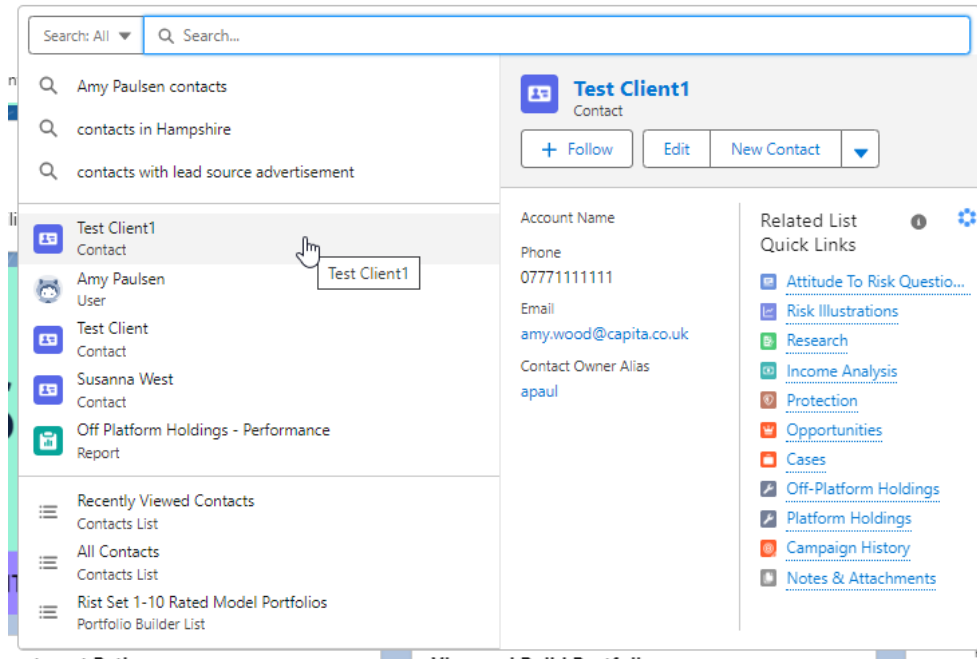


Setting Attitude to Risk Manually

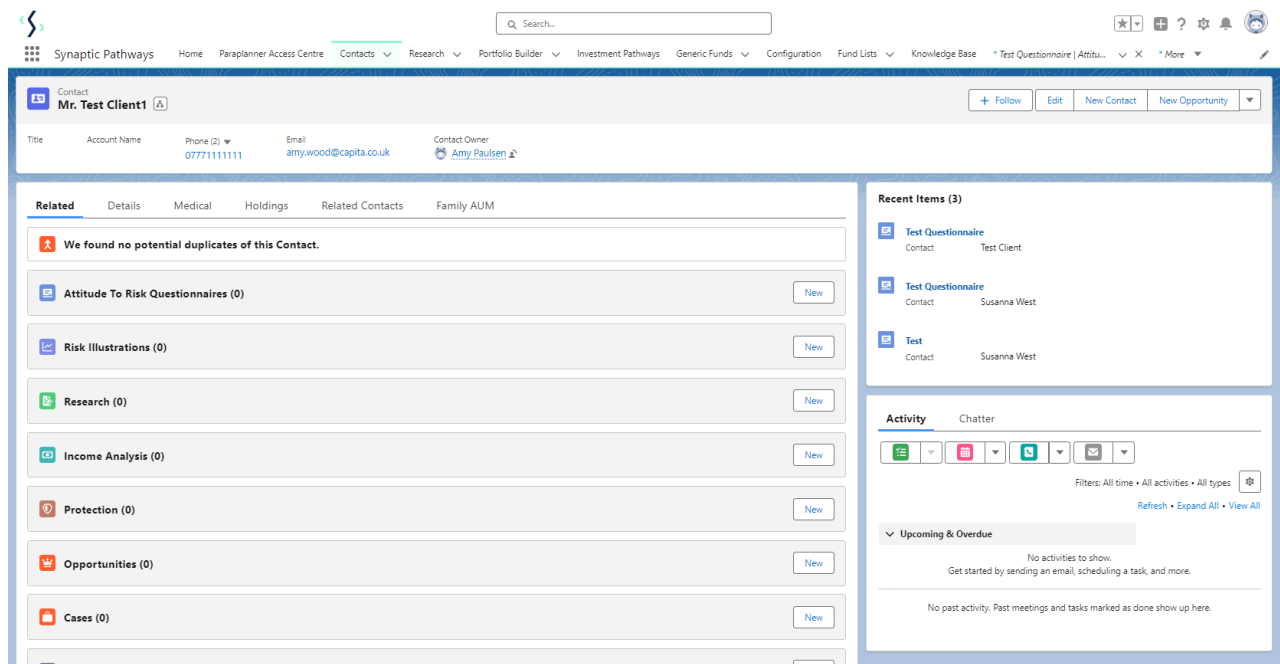
Last Modified on 13/02/2024 3:35 pm GMT

To create an attitude to risk questionnaire, create a new contact or find an existing contact record.

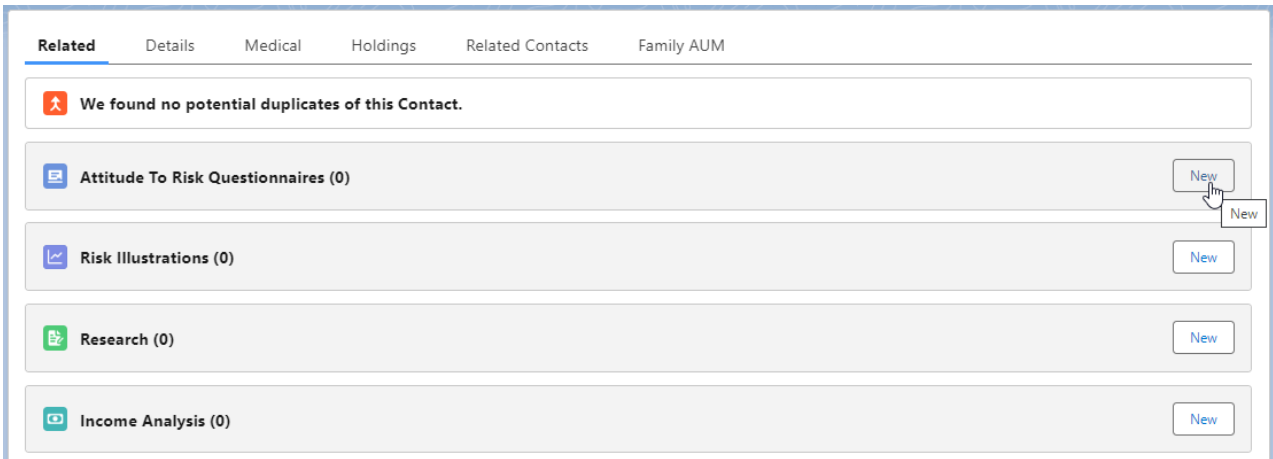
In this example, I will search for a contact called 'Test Client 1':



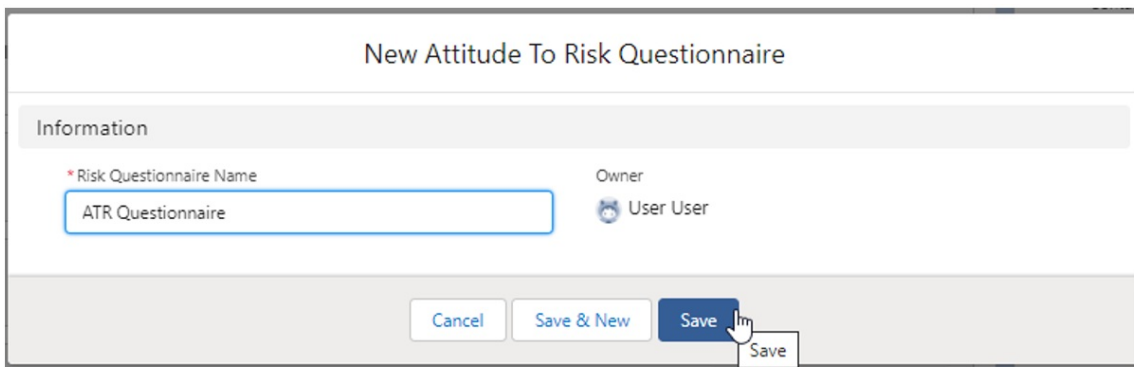
This will load up their contact record:



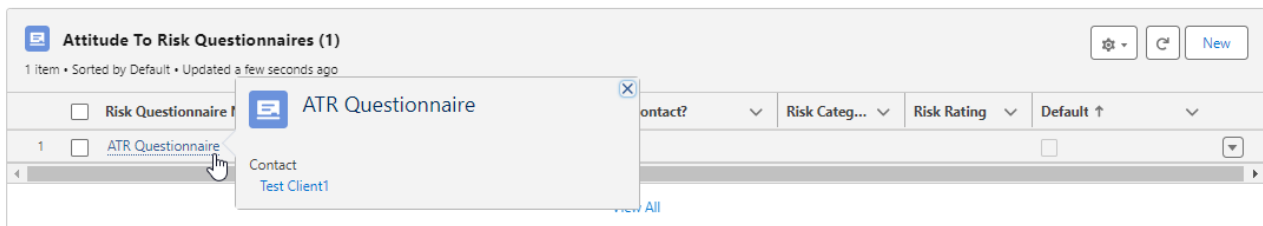
To create an attitude to risk questionnaire, click 'New' next to 'Attitude To Risk Questionnaire'



Enter the questionnaire name and click 'Save':



This will take you back to the contact record. To complete the questionnaire or send to a client to complete, click on the name of the questionnaire:



Click 'Complete Manually'

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Client Questionnaire
Test Questionnaire

Contact
Test_Client1

Details Risk Questionnaire Capacity For Loss

Complete the following questionnaire to establish your Client's attitude towards taking risk. The risk category determined will be used as a basis of comparison to ensure the final recommendation is suitable and evidenced.

Complete Manually

1. People who know me would describe me as a cautious person.
Select an option
2. I feel comfortable about investing in the stockmarket.
Select an option
3. I generally look for safer investments, even if that means lower returns.
Select an option
4. Usually it takes me a long time to make up my mind on investment decisions.
Select an option
5. I associate the word "risk" with the idea of "opportunity".
Select an option
6. I generally prefer bank deposits to riskier investments.
Select an option
7. I find investment matters easy to understand.
Select an option
8. I am willing to take substantial investment risk to earn substantial returns.
Select an option
9. I've little or no experience of investing in stocks, shares, or investment funds.
Select an option
10. I tend to be anxious about the investment decisions I've made.
Select an option
11. I'd rather take my chances with higher risk investments than have to save more.
Select an option
12. I'm not comfortable with the ups and downs of stockmarket investments.
Select an option

Risk-Profile Category Risk Rating

Complete Manually

Set the Risk Category:

Client Questionnaire

Risk Questionnaire and Capacity For Loss questions will get locked/disabled after completion so verify before saving.

* Risk Category

Select an Option

- Cautious
- Moderately Cautious
- Balanced
- Moderately Adventurous

Cancel Save

10. I tend to be anxious about the investment decisions I've made.

Complete the Compliance Reason and **Save**

Client Questionnaire

Risk Questionnaire and Capacity For Loss questions will get locked/disabled after completion so verify before saving.

*Risk Category
 Moderately Cautious

*Compliance Reason
 Test Compliance Notes

Client Questionnaire
Test Questionnaire

Contact
[Test Client1](#)

Details | Risk Questionnaire | Capacity For Loss

🔒
This questionnaire is completed and now locked, it can set as default for the Client or a new Attitude to Risk Questionnaire can be created.

1. **People who know me would describe me as a cautious person.**
 Select an option
2. **I feel comfortable about investing in the stockmarket.**
 Select an option
3. **I generally look for safer investments, even if that means lower returns.**
 Select an option
4. **Usually it takes me a long time to make up my mind on investment decisions.**
 Select an option
5. **I associate the word "risk" with the idea of "opportunity".**
 Select an option
6. **I generally prefer bank deposits to riskier investments.**
 Select an option

7. **I find investment matters easy to understand.**
 Select an option
8. **I am willing to take substantial investment risk to earn substantial returns.**
 Select an option
9. **I've little or no experience of investing in stocks, shares, or investment funds.**
 Select an option
10. **I tend to be anxious about the investment decisions I've made.**
 Select an option
11. **I'd rather take my chances with higher risk investments than have to save more.**
 Select an option
12. **I'm not comfortable with the ups and downs of stockmarket investments.**
 Select an option

Risk Profile Category: **Moderately Cautious** Risk Rating: **2**

Compliance Notes
Test Compliance Notes

'Set as default'. This will allow you to view the Risk Questionnaire report and use the risk questionnaire in Illustrations.



Q Search...



Client Questionnaire Test Questionnaire

Send to Client Set as Default Delete Set as Default

Contact Test Client1

Details Risk Questionnaire Capacity For Loss

This questionnaire is completed and now locked, it can set as default for the Client or a new Attitude to Risk Questionnaire can be created.

- 1. People who know me would describe me as a cautious person. Select an option
- 2. I feel comfortable about investing in the stockmarket. Select an option
- 3. I generally look for safer investments, even if that means lower returns. Select an option
- 4. Usually it takes me a long time to make up my mind on investment decisions. Select an option
- 5. I associate the word "risk" with the idea of "opportunity". Select an option
- 6. I generally prefer bank deposits to riskier investments. Select an option

- 7. I find investment matters easy to understand. Select an option
- 8. I am willing to take substantial investment risk to earn substantial returns. Select an option
- 9. I've little or no experience of investing in stocks, shares, or investment funds. Select an option
- 10. I tend to be anxious about the investment decisions I've made. Select an option
- 11. I'd rather take my chances with higher risk investments than have to save more. Select an option
- 12. I'm not comfortable with the ups and downs of stockmarket investments. Select an option

Risk Profile Category: Moderately Cautious Risk Rating: 2

Compliance Notes: Test Compliance Notes



Q Search...



Client Questionnaire Test Questionnaire

Success! Questionnaire is set as default for the client

Send to Client Set as Default Delete

Contact Test Client1

Details Risk Questionnaire Capacity For Loss Report

- 1. People who know me would describe me as a cautious person. Select an option
- 2. I feel comfortable about investing in the stockmarket. Select an option
- 3. I generally look for safer investments, even if that means lower returns. Select an option
- 4. Usually it takes me a long time to make up my mind on investment decisions. Select an option
- 5. I associate the word "risk" with the idea of "opportunity". Select an option
- 6. I generally prefer bank deposits to riskier investments. Select an option

- 7. I find investment matters easy to understand. Select an option
- 8. I am willing to take substantial investment risk to earn substantial returns. Select an option
- 9. I've little or no experience of investing in stocks, shares, or investment funds. Select an option
- 10. I tend to be anxious about the investment decisions I've made. Select an option
- 11. I'd rather take my chances with higher risk investments than have to save more. Select an option
- 12. I'm not comfortable with the ups and downs of stockmarket investments. Select an option

Risk Profile Category: Moderately Cautious Risk Rating: 2

Compliance Notes: Test Compliance Notes