Can we update the text on the Attitude to Risk Questionnaire when sending to a client?

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Within Configuration, under your Company Settings Risk Questionnaire Message, you can enter additional text which will appear alongside the standard email information when sending an Attitude to Risk Questionnaire to a client to complete.

Hello *<client name>*

As we discussed, here is an Attitude to Risk questionnaire that I'd like you to complete.

<your Risk Questionnaire Message text will appear here>

You do not have to enter any personal data. It's simply a list of questions about how you perceive financial risk.

This is a one-time use, private access portal. You can access it through this link:

<personalised link>

Once you've completed the questionnaire, I'll get a notification to say it's ready for me to look at.

If you have any questions about this, please do not hesitate to contact me.

Many thanks,

<your name>

<your company logo>

<your company name>

<your firm reference number>

<your disclaimer text>