

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

16/06/2025 3:41 pm BST

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>

---