

Ex-Post Reviews - Capacity for Loss

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

This article is a continuation of [Ex-Post Reviews - Costs & Charges](#)

The **Capacity for Loss** questionnaire for the proposal will need to be completed before continuing through the tabs and onto the **Client Check-In** screen.

If the questions have already been completed through the Attitude to Risk Questionnaire, they will be prepopulated.

Question 1 will need to be selected, this is the term of the investment.

The screenshot shows a software interface for an 'Ex-Post Review' titled 'Test Review 2'. The client is 'Susanna West', holding a 'Personal Pension | Fully Insured' starting on 07/11/2019 and ending on 06/11/2033. The interface has a navigation bar with tabs: Review, Client Check-In, and Report. The 'Review' tab is active, showing sub-tabs for Review Workbench, Stochastic Forecast, Deterministic Forecast, Suitability, Costs & Charges, Capacity for Loss (selected), Compliance Details, and Report Content. The 'Capacity for Loss' section includes a 'Next Period Projection' header and a list of seven questions with radio button options. Question 1 asks for the start of spending investment return, with options from '< 5 yrs' to '> 20 yrs'. Questions 2-6 have options from 'Strongly Disagree' to 'Strongly Agree'. Question 7 has 'Yes' and 'No' options. A text area for 'Supporting Notes to meet MiFID Compliance' is at the bottom. An 'Additional Information' box on the right explains the 'min gain' model. A 'Continue to Client Check-in' button is at the bottom center.

You have the opportunity to add any **Supporting Notes to meet MiFID Compliance** :

This screenshot shows a text input area for 'Supporting Notes to meet MiFID Compliance'. It features a rich text editor toolbar with options for font face (Salesforce Sans), size (12), bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, link, and unlink. The text area is currently empty.

Before moving onto the **Client Check-in**, review the remaining tabs.

For further information on Ex-Post Reviews, see article [Ex-Post Reviews - Compliance Details](#)

