

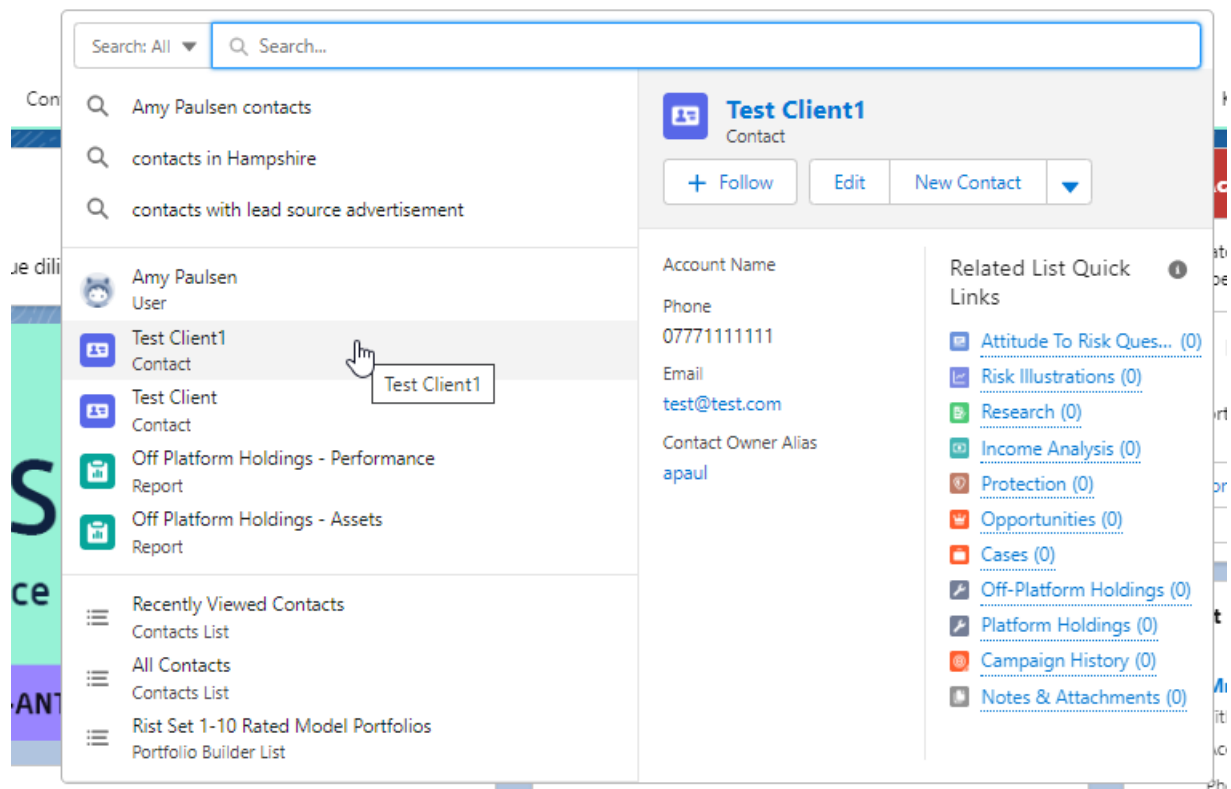
# Creating a new Decumulation Attitude to Risk Questionnaire

09/05/2025 9:34 am BST

You can create an attitude to risk questionnaire in two ways, either by completing the questions on behalf of your client, or sending them the questionnaire by email to complete themselves.

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:

The screenshot shows the Synaptic Pathways interface for a contact named 'Ms. Test Client1'. The 'Related' tab is selected, showing a list of related items with 'New' buttons next to each. The right sidebar displays 'Recent Items (0)' and 'Activity'.

To create an attitude to risk questionnaire, click 'New' next to 'Client Questionnaires'

This close-up shows the 'Client Questionnaires (0)' row. A mouse cursor is clicking the 'New' button, which has a tooltip that says 'New'.

Select **Decumulation** and **Next**:

The 'New Client Questionnaire' form is shown. Under 'Select a record type', 'Decumulation' is selected. The 'Next' button is highlighted with a mouse cursor.

Enter the questionnaire name and click **Save**

## New Client Questionnaire: Accumulation

\* = Required Information

**Information**

\* Client Questionnaire Name ↶

ATR Questionnaire

Owner

Amy Paulsen

Cancel
Save & New
Save

✓ Client Questionnaire "ATR Questionnaire" was created.
✕

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:

Client Questionnaires (2)		2 Items • Sorted by Default • Updated a few seconds ago					
		Client Questionnaire Name	Completed by	Risk Category	Record Type	Default	CFLQ Com...
1	<input type="checkbox"/>	Attitude to Risk Ques		anced (High End)	Accumulation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	ATR Questionnaire			Decumulation	<input type="checkbox"/>	<input type="checkbox"/>

ATR Questionnaire

Contact  
Susanna West

Record Type  
Decumulation

[View All](#)

Once within the questionnaire, you get a choice of sending the questionnaire to your client to complete, or complete the questions on behalf of your client.

**Client Questionnaire**  
**ATR Questionnaire**

Contact: Susanna West    Record Type: Decumulation

[Send to Client](#)   [Set as Default](#)   [Delete](#)

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**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.

1. I feel comfortable about investing in the stockmarket  
→ Select an option
2. I generally look for safer investments, even if that means lower returns  
→ Select an option
3. Usually it takes me a long time to make up my mind on investment decisions  
→ Select an option
4. A stable income is more important to me than high returns  
→ Select an option
5. I find investment matters easy to understand  
→ Select an option
6. I've little or no experience of investing in stocks, shares, or investment funds  
→ Select an option

7. I don't tend to worry if my investments go down in value  
→ Select an option
8. I generally look for higher return investments, even if that means the chance of a loss  
→ Select an option
9. I'm not comfortable with the ups and downs of stockmarket investments  
→ Select an option
10. I associate the word "risk" with the idea of "loss"  
→ Select an option
11. I tend to be anxious about the investment decisions I've made  
→ Select an option
12. People who know me would describe me as a cautious person  
→ Select an option

Risk Profile Category

Risk Rating

[Complete Manually](#)

The following articles cover how to complete the questionnaire manually and sending the questionnaire to a client:

[Creating an Attitude to Risk Questionnaire on behalf of your client](#)

[Sending an Attitude to Risk Questionnaire to your client to complete](#)