

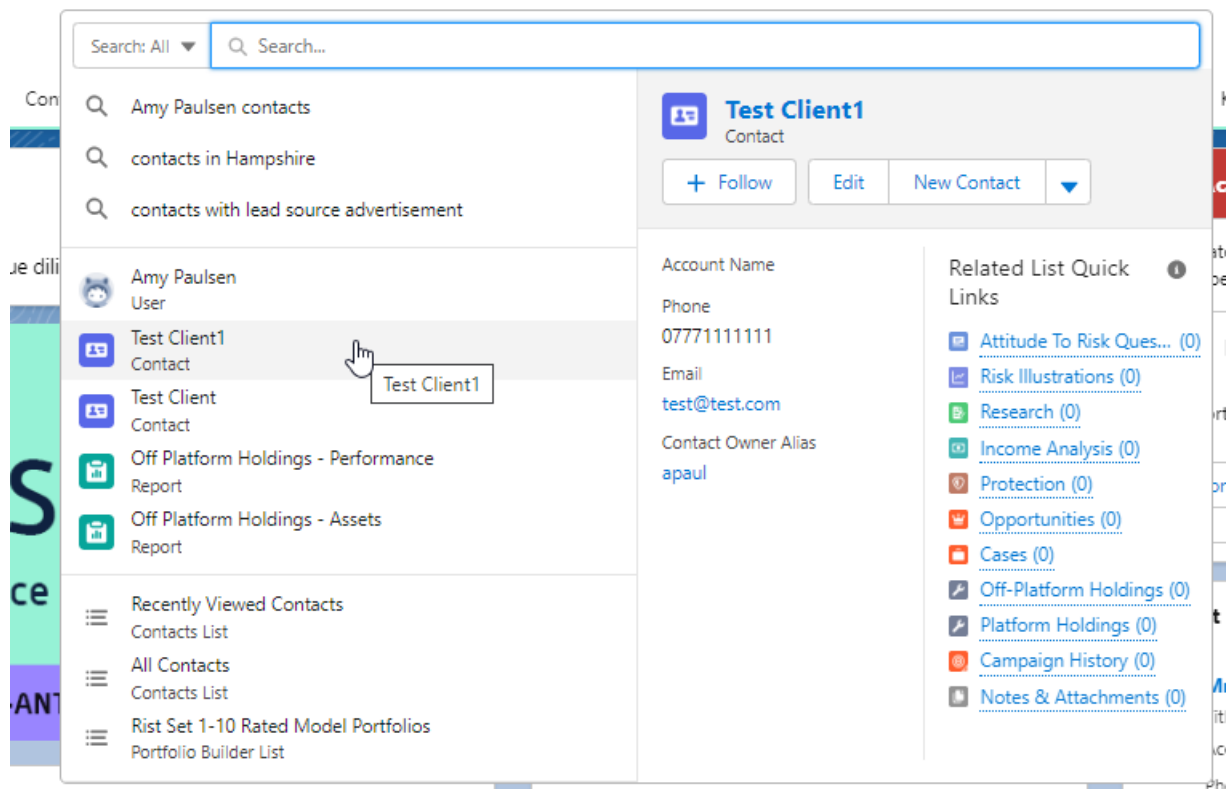
Creating a new Accumulation Attitude to Risk Questionnaire

15/04/2025 3:28 pm 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:

Synaptic Pathways

Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations Reports

Search...

Ms. Test Client1

Follow Edit New Contact New Opportunity

Title Account Name Phone (2) 0777774444 Email test@tes44.com Contact Owner Amy Pauls

Related Details Medical Holdings Related Contacts Family AUM Special Deals

We found no potential duplicates of this Contact.

Client Questionnaires (0) New

Risk Illustrations (0) New

Research (0) New

Income Analysis (0) New

Protection (0) New

Opportunities (0) New

Cases (0) New

Off-Platform Holdings (0) New

Platform Holdings (0) New

Recent Items (0)

Activity Chatter

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

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

Related Details Medical Holdings Related Contacts Family AUM Special Deals

We found no potential duplicates of this Contact.

Client Questionnaires (0) New

Risk Illustrations (0) New

Research (0) New

Income Analysis (0) New

Protection (0) New

Select **Accumulation** and **Next**:

New Client Questionnaire

Select a record type

☒ Accumulation

☐ Decumulation

Cancel Next

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 (1) ⚙️ ⌂ New

1 item • Sorted by Default • Updated a few seconds ago

	Client Questionnaire	ATR Questionnaire	Contact?	Risk Categ...	Risk Rating	Default ↓	CFLQ Completed?
1	<input type="checkbox"/> ATR Questionnaire						

Contact: Test Client1

[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 Send to Client Set as Default Delete

Contact: Test Client1

Risk Questionnaire

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. 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

Answer Sense Checks

Description of Sense Check

Your answers are very risk averse relative to the average. Your adviser will discuss a low risk portfolio with you. However, it may be the case that you do not want to take any investment risk and would prefer a savings account or equivalent. If this is the case, please discuss this with your adviser who will be able to tell you the options and implications.

Risk Profile Category Cautious

Risk Rating 1

Risk Category Description

Cautious Investors are risk averse and typically have very limited experience and understanding of investments. They often take a long time to make investment decisions and tend to be anxious about any investment decisions they have made. They tend to associate risk with potential loss rather than opportunity. They typically look for investments with lower investment risk rather than seeking higher returns. They generally prefer bank accounts and are less willing to invest in stocks, shares and investment funds. Some cautious investors will be unwilling to take any investment risk at all. Cautious investors are more risk averse than about 90% of the investing population (i.e. compared to 9 people out of 10).

[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](#)

