

# Risk Illustrations

Last Modified on 04/10/2023 12:01 pm BST

Illustrations are found within the Contact record:

The screenshot displays a CRM interface for a contact named Ms. Susanna West. The interface is divided into several sections:

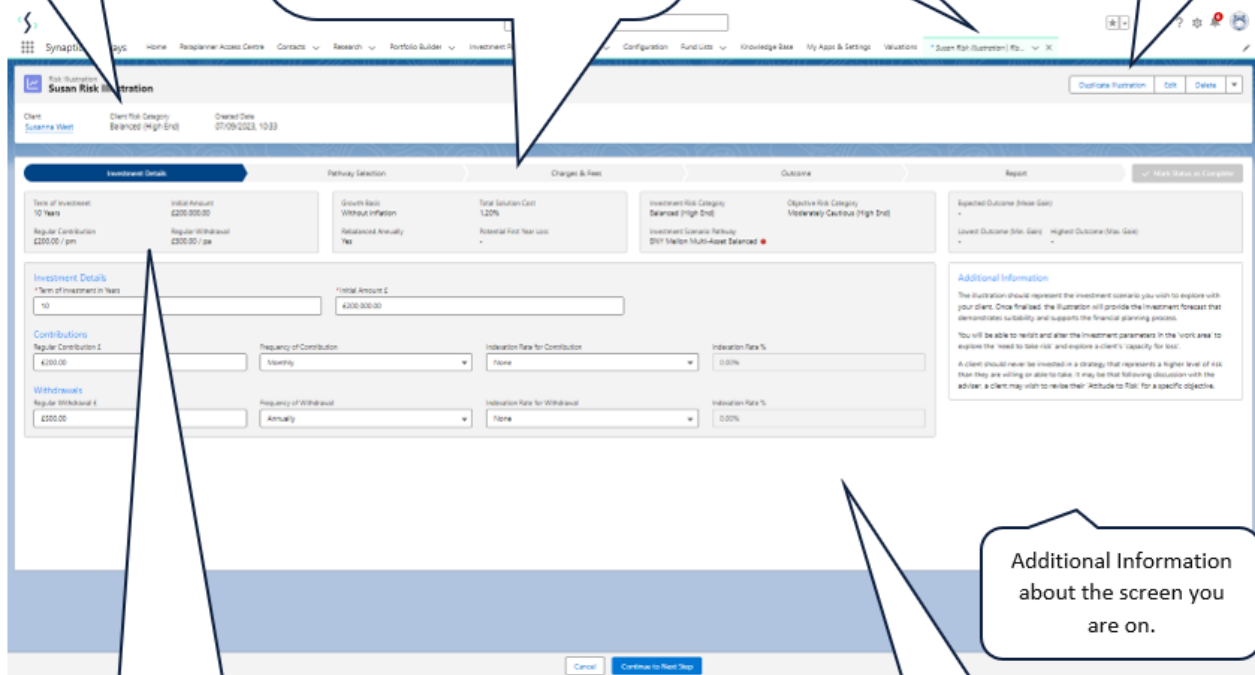
- Contact Header:** Shows the contact name, account name, phone number, email, and contact owner (Amy Paulsen).
- Related Tabs:** Includes Related, Details, Medical, Holdings, Related Contacts, and Family AUM.
- Client Questionnaires (2):** A table listing questionnaires with columns for Name, Completed status, Risk Category, Risk Rating, and Default.
- Risk Illustrations (1):** A table listing risk illustrations with columns for Name, Description of Objective, Target Risk, Term, and Review Date. This section is highlighted with a red border.
- Research (2):** A table listing research items with columns for Illustration Name, Research Type, Description, Activity Due Date, Last Modified By, and Convert to Holding.
- Income Analysis (1):** A table listing income analysis items with columns for Goal Name, Income Re..., Goal Type, Holdings, Fund Value, Income Sou..., Review Date, and Convert To.
- Recent Items (3):** A list of recent items, including ATR Questionnaire and Test Questionnaire.
- Activity:** A section for activity with filters and a list of upcoming and overdue items.

If an Attitude to Risk questionnaire has been completed and set to default, the client's risk category will show here.

This is the progress bar. Complete the details in each screen and 'Continue to Next Step' at the bottom left. As you work your way through the screens, the bar will change to a green tick to show as completed. You can click back through these if you need to amend any information later in the journey.

Your Illustration will appear in the toolbar – allowing you to work on more than one task at a time.

The Illustration can be duplicated & the title & description edited. You can also delete the Illustration & change the owner to a colleague.



These tiles will populate as you enter details of the Illustration. This summary will be available throughout the journey to refer to.

Progress back and forth through the screens using these buttons.

As you complete Investment details, the tiles above will populate

Additional Information about the screen you are on.