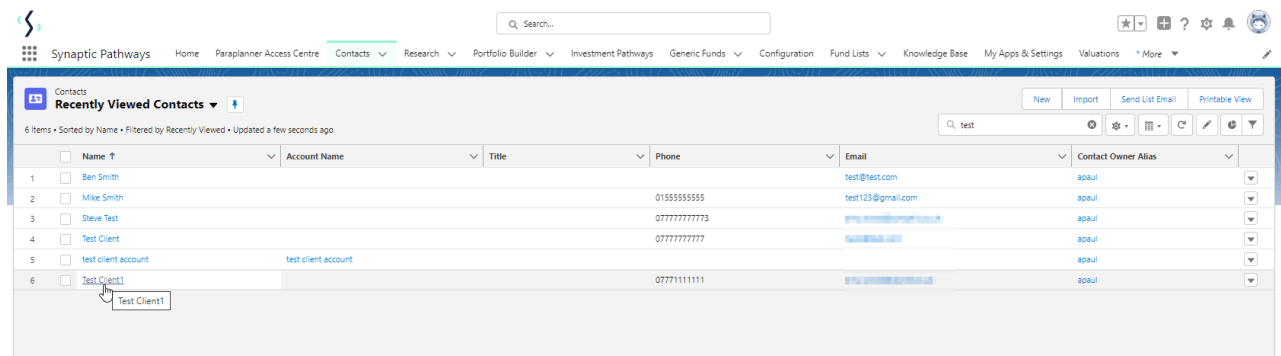


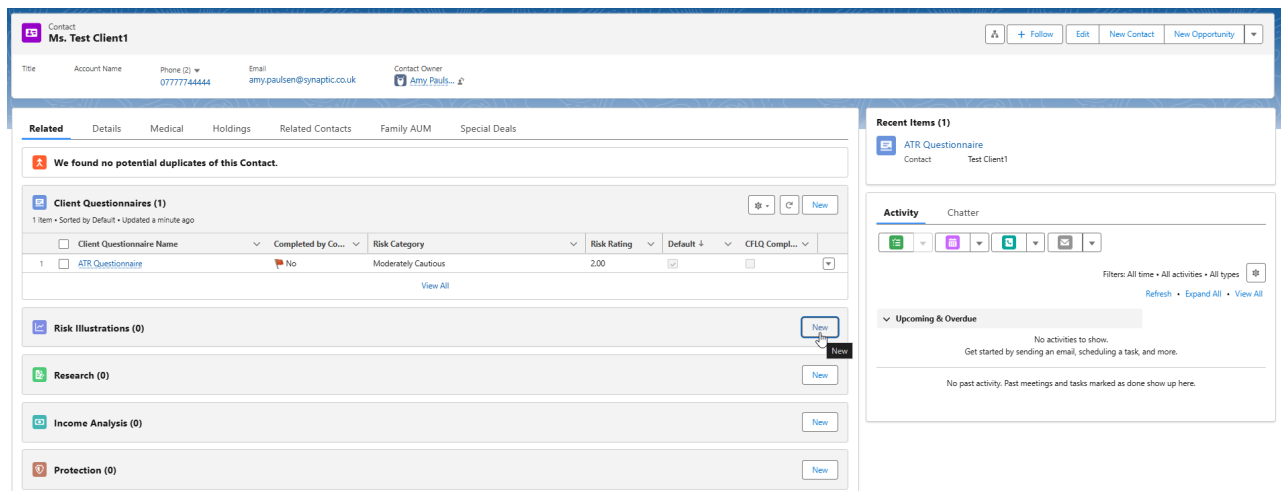
Risk Illustrations - Creating an Illustration

15/04/2025 4:07 pm BST

To create an illustration for a client, load up the client's contact record:



Click 'New' to create a new illustration:



Complete Illustration Name, Description of Objective and the client questionnaire you would like to pull through to the illustration, Accumulation or Decumulation:

New Risk Illustration

* = Required Information

Information

* Illustration Name ↶

Risk Illustration

Description of Objective

* Accumulation / Decumulation

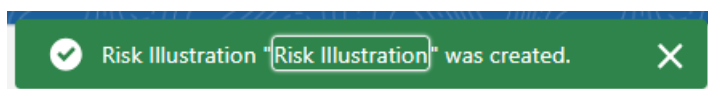
Accumulation

--None--

✓ Accumulation

Decumulation

Save & New Save



Click back into the illustration by clicking on the Illustration name:

Risk Illustrations (1)

1 Item • Updated a few seconds ago

✕

Risk Illustration

Illustration Name

1 ☐ Risk Illustration

Client: Test Client1

Client Risk Category: Moderately Cautious

Created Date: 15/04/2025, 16:06

Description o... Target Risk C... Term Review Date

View All

Research (0) New

For information on completing the Illustration, see below articles:

[Illustrations - Investment Details](#)

[Illustration - Pathway Selection](#)