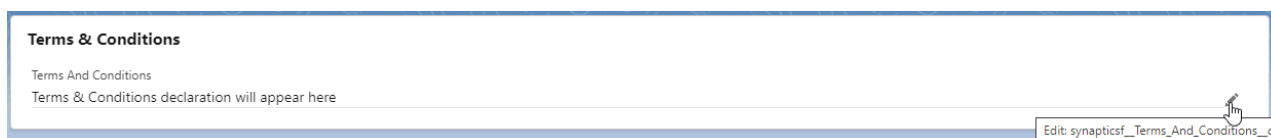


Company Settings - Terms & Conditions, Disclaimer and Risk Questionnaire Message

25/02/2025 12:41 pm GMT

The Terms & Conditions, Disclaimer and Risk Questionnaire Message areas allow you to add your own wording which will appear on digital outputs.

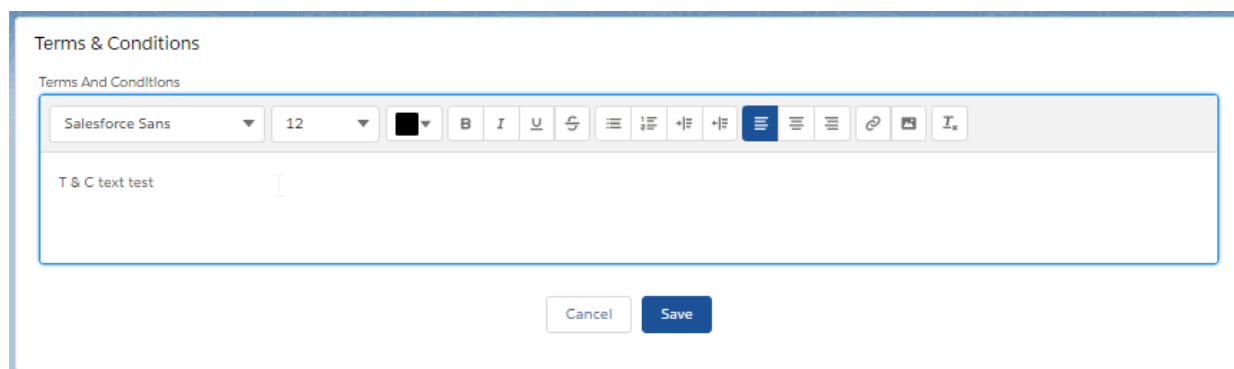
Edit by selecting the pen icon to the right of the field:



Terms & Conditions
Terms And Conditions
Terms & Conditions declaration will appear here

Edit: synapticsf__Terms_And_Conditions__c

Add in your Terms & Conditions text and 'Save'



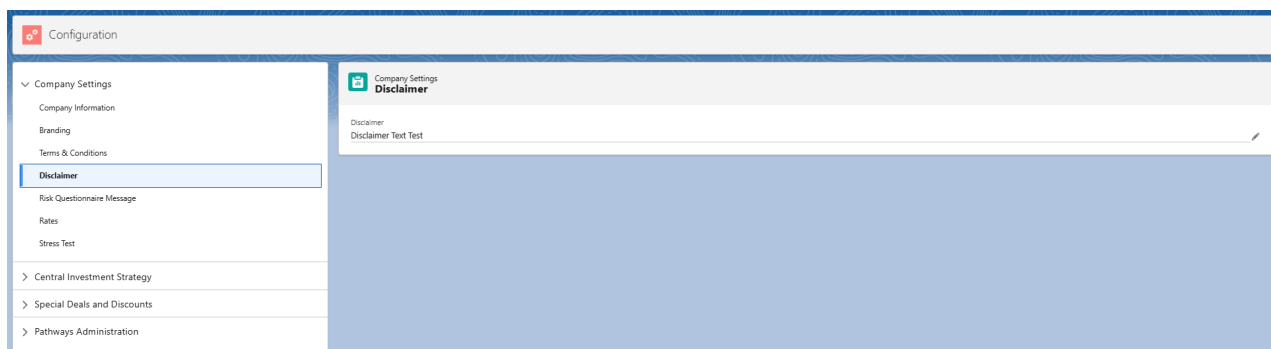
Terms & Conditions
Terms And Conditions

Salesforce Sans 12 B I U T & C text test

Cancel Save

Disclaimer and Risk Questionnaire Message work in the same way:

The Disclaimer will appear on your reports and as a footer in emails to the client:



Configuration

- Company Settings
 - Company Information
 - Branding
 - Terms & Conditions
 - Disclaimer**
 - Risk Questionnaire Message
 - Rates
 - Stress Test
- Central Investment Strategy
- Special Deals and Discounts
- Pathways Administration

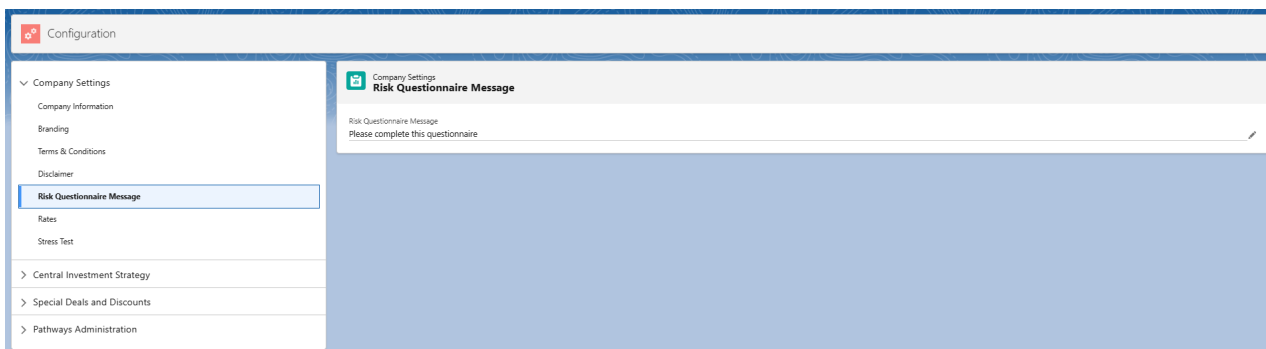
Company Settings
Disclaimer

Disclaimer
Disclaimer Text Test



Disclaimer
Disclaimer Text Test

The Risk Questionnaire Message will appear on the email sent to the client to complete an attitude to risk questionnaire.



Hello Test,

As we discussed, here is an Attitude to Risk questionnaire that I'd like you to complete.

Please complete this questionnaire

You do not have to enter any personal data. It's simply a list of questions about how you perceive financial risk.

This is a one-time use, private access portal. You can access it through this link:

<https://atrquestionnaireuat.UM6.force.com/questionnaire?Id=a034K000001HQDgQAO>

Once you've completed the questionnaire, I'll get a notification to say it's ready for me to look at.

If you have any questions about this, please do not hesitate to contact me.

Many thanks,
Amy Paulsen

Andrea Advisor

Disclaimer Text Test
