

Why is the 'Use Client's Default Risk Category' greyed out on the Pathway Selection screen?

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The 'Use the Client's Default Attitude to Risk' button is greyed out if the Client's attitude to risk questionnaire has not been completed and set to default.

Navigate to the client and either complete an attitude to risk questionnaire manually or email the questionnaire to the client to complete. Once the questions are populated, select the 'Set as default for Client' button.

If the questionnaire has already been completed, make sure it is set to default by clicking into the questionnaire and select the 'Set as default for Client' button.

Attitude To Risk Questionnaire
Test Questionnaire

Contact
Test Client

Details 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. Agree
2. I feel comfortable about investing in the stockmarket. Agree
3. I generally look for safer investments, even if that means lower returns. Agree
4. Usually it takes me a long time to make up my mind on investment decisions. Agree
5. I associate the word "risk" with the idea of "opportunity". Disagree
6. I generally prefer bank deposits to riskier investments. Agree
7. I find investment matters easy to understand. Agree
8. I am willing to take substantial investment risk to earn substantial returns. Disagree
9. I've little experience of investing in stocks, shares, or investment funds. Agree
10. I tend to be anxious about the investment decisions I've made. Agree
11. I'd rather take my chances with higher risk investments than have to save more. Disagree
12. I'm not comfortable with the ups and downs of stockmarket investments. Agree

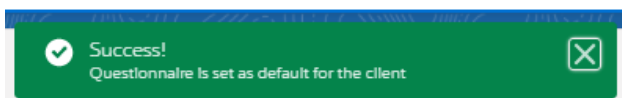
Risk Profile Category: Balanced (Low End) Risk Rating: 5

Risk Category Description
Balanced Investors have an attitude to risk in the middle 50% of the investing population and are neither very risk averse nor inclined to seek riskier investments. They often have some experience and understanding of investments. They can usually make investment decisions without too much hesitation or anxiety. They may find more comfort in banks accounts and lower risk investments than stocks, shares and investment funds, but understand that investment risk may be required to meet their investment goals.

Optional Compliance Notes

Set as default for Client

Once set, a success message will appear:



The field within the pathway selection screen can now be selected.

