

# Client Check-in

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The **Client Check-In** allows you to add commentary to evidence that the clients attitude to risk, knowledge & experience and personal circumstances have been assessed.

The screenshot displays the 'Client Check-in' interface within a software application. The top navigation bar includes 'Synaptic Pathways' and various menu items. The main content area is titled 'Susanna Comparison w/ Ex-ante' and features a progress bar with steps: 'Attitude to Risk', 'Knowledge & Experience', 'Personal Circumstances', 'Tolerance for Loss', and 'Capacity for Loss'. The 'Client Check-in' step is currently active. A 'What's Shown Here...' box on the left provides instructions: 'Add commentary for each section to evidence that the clients attitude to risk, knowledge & experience and personal circumstances have been assessed.' The interface contains five main sections, each with a 'Declaration' and a text input area. Each section includes a font dropdown menu (set to 'Salesforce Sans') and a size dropdown menu (set to '12'). The sections are: 'Attitude to Risk' (Declaration of Attitude to Risk), 'Knowledge & Experience' (Declaration of Knowledge & Experience), 'Personal Circumstances' (Declaration of Personal Circumstances), 'Tolerance for Loss' (Declaration of Tolerance for Loss), and 'Capacity for Loss' (Declaration of Capacity for Loss). At the bottom, there are two buttons: 'Back to Ex-ante Illustration' and 'Continue to Report'.

Once complete, **Continue to Report**

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