

# Client Check-in - CIP

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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 - CIP' interface. At the top, there is a navigation menu with options like Synaptic Pathways, Home, and Research. A search bar is located on the right. Below the navigation, the main header shows 'Susanna Comparison w/Ex-ante CIP' and a 'Convert to Holding' button. The main content area is divided into several sections, each with a declaration form:

- Attitude to Risk:** Declaration of Attitude to Risk. Provide details to evidence that the illustration(s) are suitable given the clients current overall attitude to risk.
- Knowledge & Experience:** Declaration of Knowledge & Experience. Provide details to evidence that the illustration(s) are suitable given the clients current knowledge and experience.
- Personal Circumstances:** Declaration of Personal Circumstances. Provide details to evidence that the illustration(s) are suitable given the clients personal circumstances.
- Tolerance for Loss:** Declaration of Tolerance for Loss. Provide details to evidence that the illustration(s) are suitable given the clients tolerance for loss.
- Capacity for Loss:** Declaration of Capacity for Loss. Provide details to evidence that the illustration(s) are suitable given the clients capacity for loss.

Each declaration form includes a text area and a rich text editor toolbar. At the bottom of the interface, there are two buttons: 'Back to Ex-ante Illustration' and 'Continue to Report'.

Once complete, **Continue to Report**

Two buttons are shown side-by-side. The first is 'Back to Ex-ante Illustration' and the second is 'Continue to Report'. A mouse cursor is pointing at the 'Continue to Report' button.