

Ex-Ante - 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. At the top, there is a navigation menu with options like 'Synaptic Pathways', 'Home', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. A search bar is also present. The main content area is titled 'Research Test Illustration Apr22' and includes a 'Convert to Holding' button. Below this, there are tabs for 'Research', 'Client Check-in', and 'Report'. A 'Mark Status as Complete' button is also visible. The 'Client Check-in' section is active and contains five distinct sections, each with a blue header and a declaration text:

- 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 section includes a rich text editor with a toolbar containing options for font style (Salesforce Sans), size (12), bold, italic, underline, link, unlink, bulleted list, numbered list, indent, and outdent. At the bottom of the interface, there are two buttons: 'Back to Ex-ante Illustration' and 'Continue to Report'.

Once complete, **Continue to Report**

This image shows a close-up of the 'Continue to Report' button from the interface. The button is dark blue with white text. A mouse cursor is positioned over the button, indicating it is the intended action to be taken after completing the client check-in process.