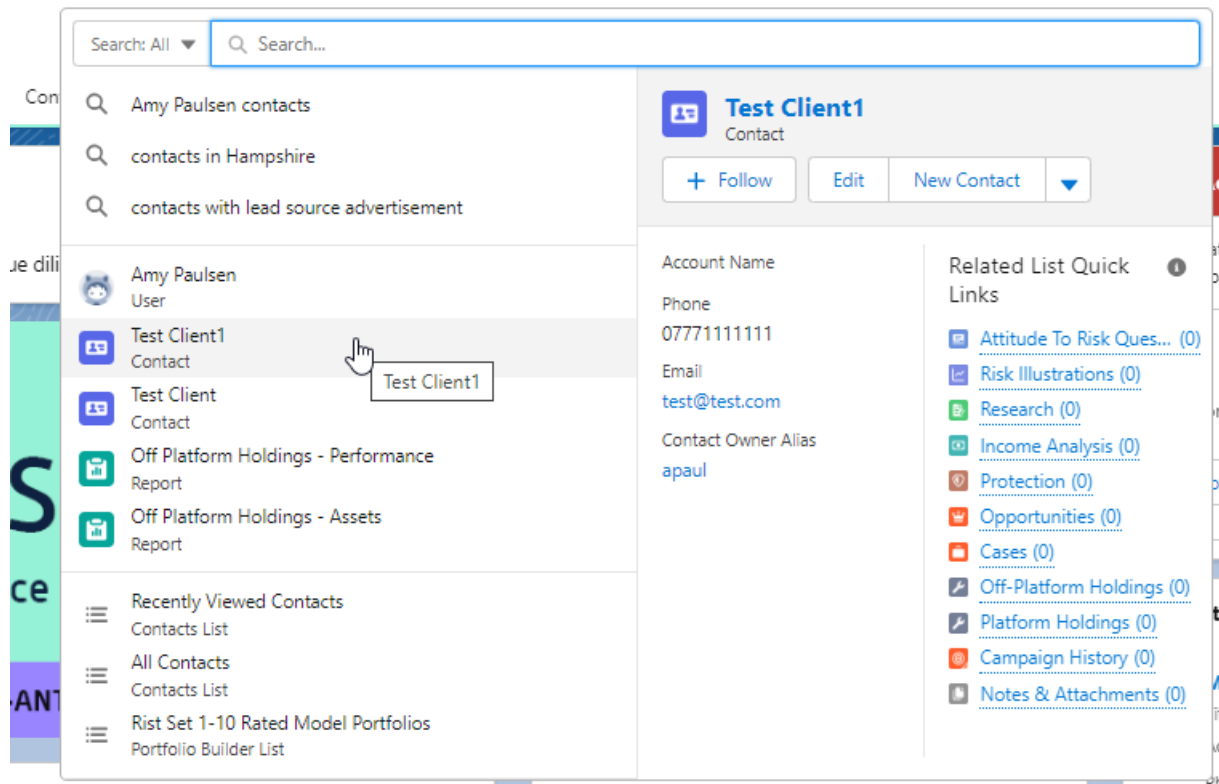


Setting Attitude to Risk Manually

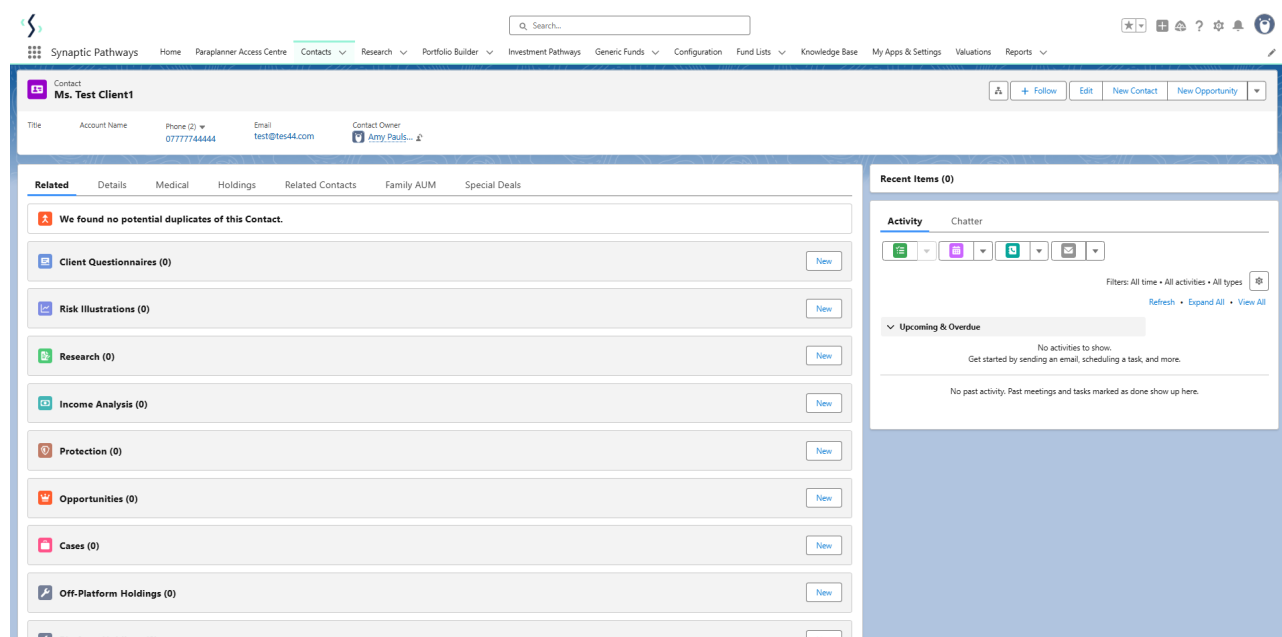
15/04/2025 3:53 pm BST

To create an attitude to risk questionnaire, create a new contact or find an existing contact record.

In this example, I will search for a contact called 'Test Client 1':



This will load up their contact record:



To create an attitude to risk questionnaire, click 'New' next to 'Client Questionnaires'

Related Details Medical Holdings Related Contacts Family AUM Special Deals

We found no potential duplicates of this Contact.

Client Questionnaires (0) [New](#)

Risk Illustrations (0) [New](#)

Research (0) [New](#)

Income Analysis (0) [New](#)

Protection (0) [New](#)

Select **Accumulation** and **Next**:

New Client Questionnaire

Select a record type

☒ Accumulation

☐ Decumulation

[Cancel](#) [Next](#)

Enter the questionnaire name and click **Save**

New Client Questionnaire: Accumulation

* = Required Information

Information

* Client Questionnaire Name

Owner Amy Paulsen

[Cancel](#) [Save & New](#) [Save](#)

Client Questionnaire "ATR Questionnaire" was created. [X](#)

This will take you back to the contact record. To complete the questionnaire or send to a client to complete, click on the name of the questionnaire:

Client Questionnaire

Risk Questionnaire and Capacity For Loss questions will get locked/disabled after completion so verify before saving.

*Risk Category

Moderately Cautious

*Compliance Reason

Test Compliance Notes

[Cancel](#)
[Save](#)

Client Questionnaire
ATR Questionnaire

[Send to Client](#)
[Set as Default](#)
[Delete](#)

Contact
[Test Client1](#)

Details
Risk Questionnaire
Capacity For Loss

This questionnaire is completed and now locked, it can set as default for the Client or a new Attitude to Risk Questionnaire can be created.

1. People who know me would describe me as a cautious person.
Select an option

2. I feel comfortable about investing in the stockmarket.
Select an option

3. I generally look for safer investments, even if that means lower returns.
Select an option

4. Usually it takes me a long time to make up my mind on investment decisions.
Select an option

5. I associate the word "risk" with the idea of "opportunity".
Select an option

6. I generally prefer bank deposits to riskier investments.
Select an option

7. I find investment matters easy to understand.
Select an option

8. I am willing to take substantial investment risk to earn substantial returns.
Select an option

9. I've little or no experience of investing in stocks, shares, or investment funds.
Select an option

10. I tend to be anxious about the investment decisions I've made.
Select an option

11. I'd rather take my chances with higher risk investments than have to save more.
Select an option

12. I'm not comfortable with the ups and downs of stockmarket investments.
Select an option

Answer Sense Checks

Description of Sense Check
Your answers are very risk averse relative to the average. Your adviser will discuss a low risk portfolio with you. However, it may be the case that you do not want to take any investment risk and would prefer a savings account or equivalent. If this is the case, please discuss this with your adviser who will be able to tell you the options and implications.

Risk Profile Category
Cautious

Risk Rating
1

Risk Category Description
Cautious Investors are risk averse and typically have very limited experience and understanding of investments. They often take a long time to make investment decisions and tend to be anxious about any investment decisions they have made. They typically look for investments with lower investment risk rather than seeking higher returns. They generally prefer bank accounts and are less willing to invest in stocks, shares and investment funds. Some cautious investors will be unwilling to take any investment risk at all. Cautious investors are more risk averse than about 90% of the investing population (i.e. compared to 9 people out of 10).

'Set as default'. This will allow you to view the Risk Questionnaire report and use the risk questionnaire in Illustrations.

Client Questionnaire
ATR Questionnaire

[Send to Client](#)
[Set as Default](#)
[Delete](#)

Contact
[Test Client1](#)

Details
Risk Questionnaire
Capacity For Loss

This questionnaire is completed and now locked, it can set as default for the Client or a new Attitude to Risk Questionnaire can be created.

1. People who know me would describe me as a cautious person.
Select an option

2. I feel comfortable about investing in the stockmarket.
Select an option

3. I generally look for safer investments, even if that means lower returns.
Select an option

4. Usually it takes me a long time to make up my mind on investment decisions.
Select an option

5. I associate the word "risk" with the idea of "opportunity".
Select an option

6. I generally prefer bank deposits to riskier investments.
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