Creating a new Decumulation Attitude to Risk Questionnaire

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You can create an attitude to risk questionnaire in two ways, either by completing the questions on behalf of your client, or sending them the questionnaire by email to complete themselves.

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':

	Sear	rch: All 🔻 🔍 Search			
Con	α α α	Amy Paulsen contacts contacts in Hampshire contacts with lead source advertisement	Test Client1 Contact + Follow Edit	New Contact 🗨	ł
.e dili	6	Amy Paulsen User	Account Name Phone	Related List Ouick 🛛 🔊	at De
	E	Test Client1 Contact Test Client1 Test Client1	07771111111 Email test@test.com	 Attitude To Risk Ques (0) Risk Illustrations (0) Research (0) 	
С		Contact Off Platform Holdings - Performance Report	Contact Owner Alias apaul	 Income Analysis (0) Desterior (0) 	ort pr
5	đ	Off Platform Holdings - Assets Report		Opportunities (0) Cases (0)	
ce	≔	Recently Viewed Contacts Contacts List		 Off-Platform Holdings (0) Platform Holdings (0) Campaign History (0) 	t
AN	≡ ≡	All Contacts Contacts List Rist Set 1-10 Rated Model Portfolios Portfolio Builder List		Notes & Attachments (0)	∕lı īti ₀o
					dh.

This will load up their contact record:

Cy Synaptic Pathways Home Parsplanner Access Centre Contacts > Research > Portfolio Builder > Investment Pathways Generic Funds > Configuration Fund Lists > Knowledge B	ی کې چې کې او کې پې کې کې پې کې کې کې پې کې
Const.t Ms. Test Client1	A + Follow Edit New Contact New Opportunity
Tite Account Name Proce (2) ▼ Email Contact Owner 07777744444 test@tes44.com	
Related Details Medical Holdings Related Contacts Family AUM Special Deals	Recent Items (0)
8 We found no potential duplicates of this Contact.	Activity Chatter
Client Questionnaires (0)	E V V V V Fiters All time • All activities • All types
Risk Illustrations (0)	nuess on units on accounts of an upper way
	V Upcoming & Overdue
Research (0)	No activities to show. Get started by sending an email, scheduling a task, and more.
Income Analysis (0) Ness	No past activity. Past meetings and tasks marked as done show up here.
Protection (0)	
Opportunities (0)	
Casez (0) New	
Off-Platform Holdings (0)	
Platform Holdinos (0)	

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

Related	Details	Medical	Holdings	Related Contacts	Family AUM	Special Deals			
🚶 We fo	X We found no potential duplicates of this Contact.								
🗵 Client	Questionnai	ires (0)							
Risk I	llustrations (0)				New			
🖹 Resea	rch (0)					New			
🖸 Incom	ne Analysis (0))				New			
Prote-	ction (0)					New			

Select Decumulation and Next:

	New Client Questionnaire					
2	Select a record type O Accumulation O Decumulation					
	Cancel					

Enter the questionnaire name and click **Save**

Ν	ew Client Questionnaire: Accumulation	
		* = Required Information
Information		
*Client Questionnaire Name	Owner Owner Owner	
	Cancel Save & New Save	
✓ Client Questionnaire "ATR Q) Juestionnaire" 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 Questionnaires (2) Cri New 2 Items + Sorted by Default + Updated a few seconds ago Cri New									
Client Questionnair	Nama V	Completed by V Did	Category	\sim	Record Type	~	Default↓ ∨	CFLQ Com $ \lor $	
1 Attitude to Risk Ques	ATR Question	aire	nced (High End)		Accumulation		~		•
2 ATR Questionnaire					Decumulation				
2		Record Type Decumulation	View All						

Once within the questionnaire, you get a choice of sending the questionnaire to your client to complete, or complete the questions on behalf of your client.

Client Questionnaire ATR Questionnaire		Send to Client Set as Default Delete
Contact Record Type Susanna West Decumulation		
🔚 Details 🛛 🖉 Risk Questionnaire 🚽 K Capacity For Loss		
Complete the following questionnaire to establish your Client's attitude towards taking risk. The risk category determined will be u	sed as a basis of comparison to ensure the final recommendation is suitable and evidenced.	✓ Complete Manually
1. I feel comfortable about investing in the stockmarket → Select an option	7. I don't tend to worry if my investments go down in value Select an option	Risk Profile Category Risk Rating
2. I generally look for safer investments, even if that means lower returns	I generally look for higher return investments, even if that means the chance of a loss	
Select an option v . Usually it takes me a long time to make up my mind on investment decisions	Select an option	
→ Select an option	9. I'm not comfortable with the ups and downs of stockmarket investments → Select an option	
4. A stable income is more important to me than high returns Select an option	10. I associate the word "risk" with the idea of "loss" → Select an option •	
5. I find investment matters easy to understand → Select an option ▼	Itend to be anxious about the investment decisions I've made	
6. I've little or no experience of investing in stocks, shares, or investment funds	Select an option V	
→ Select an option	People who know me would describe me as a cautious person Select an option ▼	
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The following articles cover how to complete the questionnaire manually and sending the questionnaire to a client:

Creating an Attitude to Risk Questionnaire on behalf of your client

Sending an Attitude to Risk Questionnaire to your client to complete