

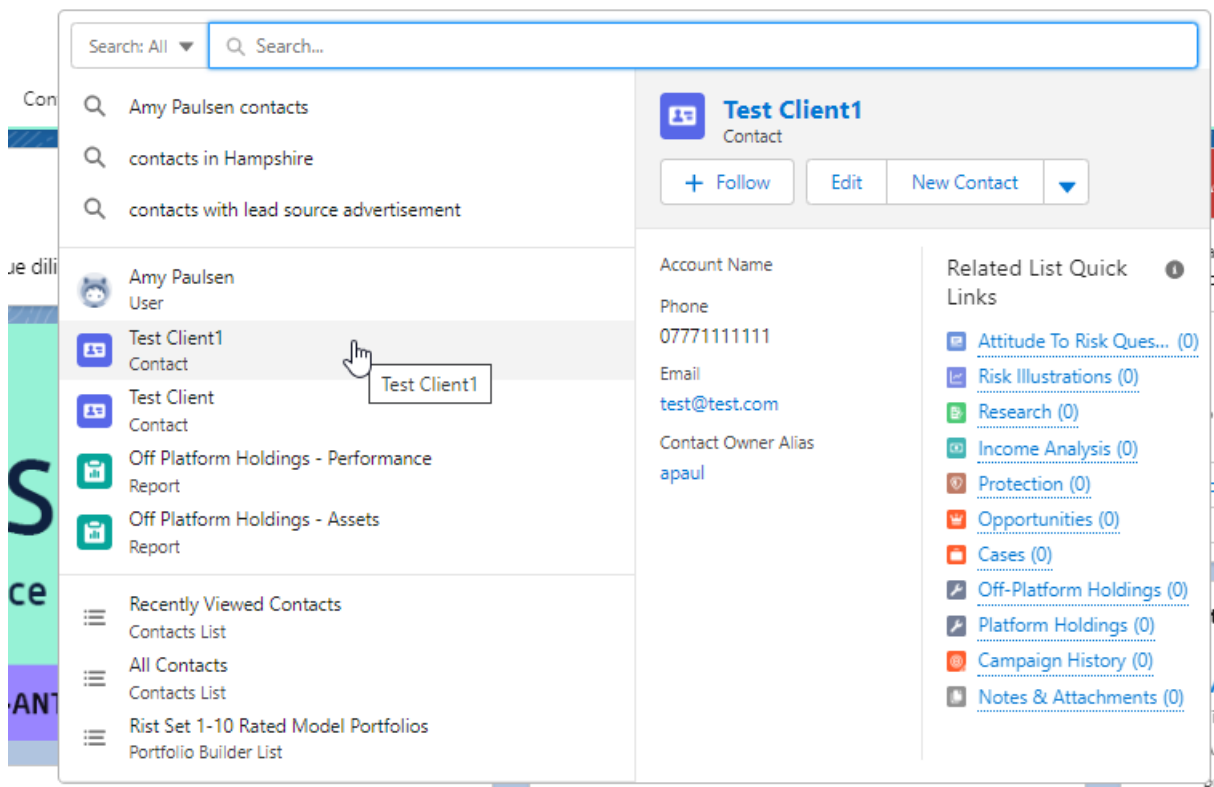
Creating a new Decumulation Attitude to Risk Questionnaire

09/05/2025 9:34 am BST

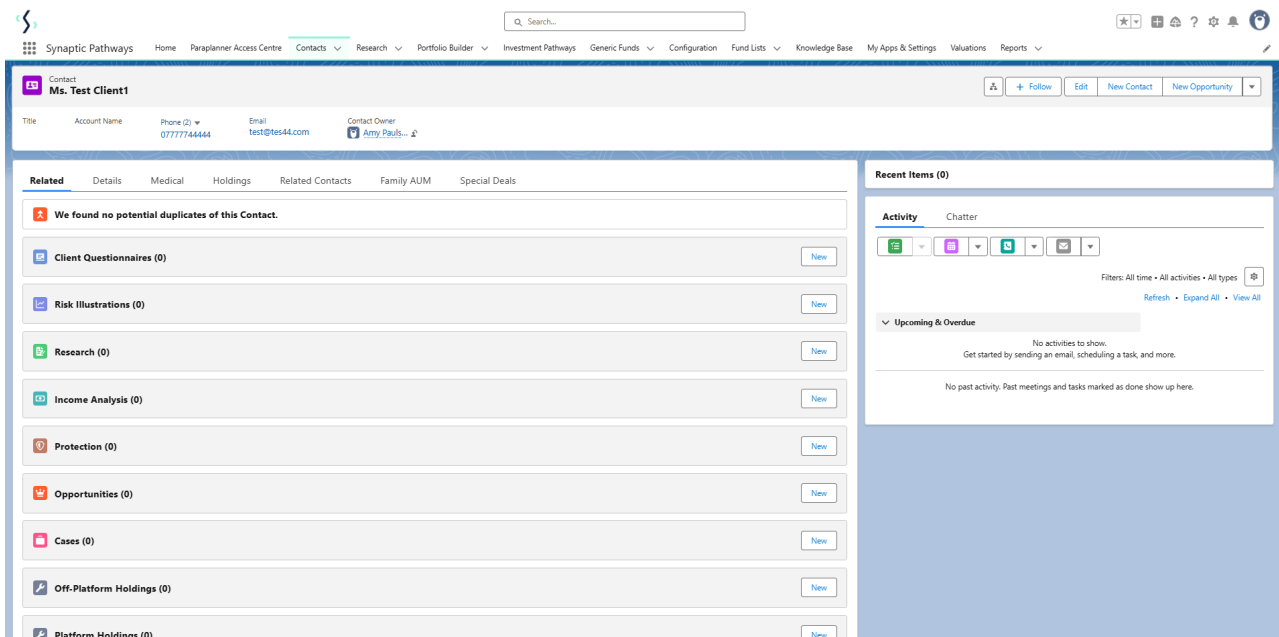
You can create an attitude to risk questionnaire in two ways, either by completing the questions on behalf of your client, or sending them the questionnaire by email to complete themselves.

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

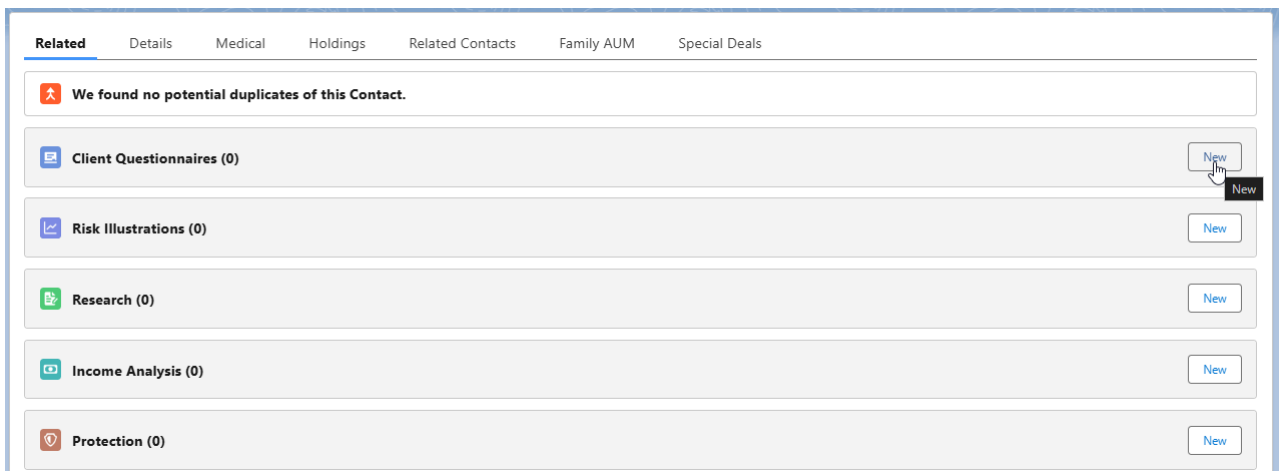
In this example, I will search for a contact called 'Test Client 1':



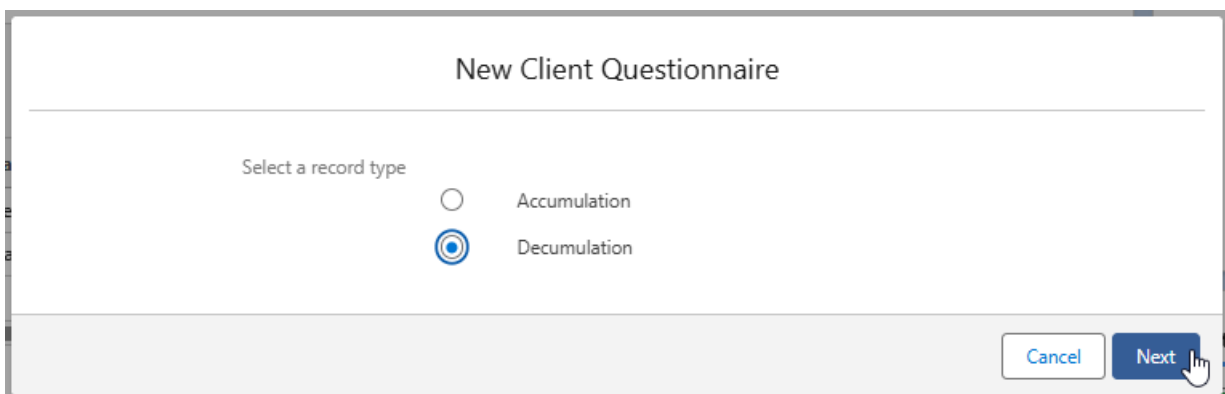
This will load up their contact record:



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



Select Decumulation and Next:




Enter the questionnaire name and click Save

New Client Questionnaire: Accumulation

* = Required Information

Information


* Client Questionnaire Name Owner  Amy Paulsen

✓ Client Questionnaire "ATR Questionnaire" was created.
✕

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) ☆ ☰ New

2 Items • Sorted by Default • Updated a few seconds ago

<input type="checkbox"/>	Client Questionnaire Name	Completed by	Risk Category	Record Type	Default	CFIQ Com...
<input type="checkbox"/>	Attitude to Risk Ques	 ATR Questionnaire	anced (High End)	Accumulation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	ATR Questionnaire	Contact Susanna West		Decumulation	<input type="checkbox"/>	<input type="checkbox"/>

[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: Susanna West Record Type: Decumulation

Details Risk Questionnaire Capacity For Loss


Complete the following questionnaire to establish your Client's attitude towards taking risk. The risk category determined will be used as a basis of comparison to ensure the final recommendation is suitable and evidenced. Complete Manually

- I feel comfortable about investing in the stockmarket
Select an option
- I generally look for safer investments, even if that means lower returns
Select an option
- Usually it takes me a long time to make up my mind on investment decisions
Select an option
- A stable income is more important to me than high returns
Select an option
- I find investment matters easy to understand
Select an option
- I've little or no experience of investing in stocks, shares, or investment funds
Select an option

- I don't tend to worry if my investments go down in value
Select an option
- I generally look for higher return investments, even if that means the chance of a loss
Select an option
- I'm not comfortable with the ups and downs of stockmarket investments
Select an option
- I associate the word "risk" with the idea of "loss"
Select an option
- I tend to be anxious about the investment decisions I've made
Select an option
- People who know me would describe me as a cautious person
Select an option

Risk Profile Category

Risk Rating



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](#)