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':

	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
ue dili	6	Amy Paulsen User	Account Name Phone	Related List Quick 0 Links	at) De
	E	Test Client1 Contact Test Client Test Client1	07771111111 Email test@test.com	 Attitude To Risk Ques (0) Risk Illustrations (0) Research (0) 	rt
ς	8	Off Platform Holdings - Performance Report	Contact Owner Alias apaul	 Income Analysis (0) Protection (0) 	or
		Off Platform Holdings - Assets Report		Cases (0) Cases (0) Off-Platform Holdings (0)	
ce	=	Recently Viewed Contacts Contacts List All Contacts		 Platform Holdings (0) Campaign History (0) 	t
AN	=	Contacts List Rist Set 1-10 Rated Model Portfolios Portfolio Builder List		Notes & Attachments (0)	∕l i īti ₀o

This will load up their contact record:

G. Search. Synaptic Pathways Home Paraplanner Access Centre Contacts v Research v Portfolio Builder v Investment Pathways Generic Funds v Configuration Fund Lists v Knowledge	🔭 🖩 💩 ? 🌣 🌲 🤭
Contact Ms. Test Client1	A + Follow Edit New Contact New Opportunity ▼
Title Account Name Proce (2) ↓ Email Contact Owner 07777744444 testigites44.com ♥ Anny Paulis £	
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)	
Risk Illustrations (0)	Refresh - Expand All - View All
	V Upcoming & Overdue
Research (0)	No activities to show. Get started by sending an email, scheduling a task, and more.
Income Analysis (0)	No past activity: Past meetings and tasks marked as done show up here.
Protection (0)	
Opportunities (0)	
Cases (8)	
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**

N	ew Client Questionnaire: Accumulation	
		* = Required Information
Information		
* Client Questionnaire Name	Owner Owner Owner	
	Cancel Save & New Save	
Client Questionnaire "ATP C	Justionnaira" 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:

E Client Questionnaires (2) 2 items + Sorted by Default + Updated a few seconds ago								
Client Questionnaire Name	Category	~	Record Type	~	Default ↓	~	CFLQ Com \vee	
1 Attitude to Risk Ques E ATR Questionnaire	nced (High End)		Accumulation		~			•
2 ATR Questionnaire			Decumulation					-
Contact Record Type Susanna West 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 Susana West 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 up	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 3. Select an option 4. Vertical and Vertical Antipology (Vertical Antipology	 I generally look for higher return investments, even if that means the chance of a loss 	<u> </u>						
3. Usually it takes me a long time to make up my mind on investment decisions	Select an option							
Select an option V	Select an option V							
Select an option	10. I associate the word "risk" with the idea of "loss" → Select an option ▼	_ ° ل 킂						
5. I find investment matters easy to understand								
→ Select an option ▼	I tend to be anxious about the investment decisions I ve made Select an option							
6. I've little or no experience of investing in stocks, shares, or investment funds	12. People who know me would describe me as a cautious person							
	→ Select an option ▼							
C								

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