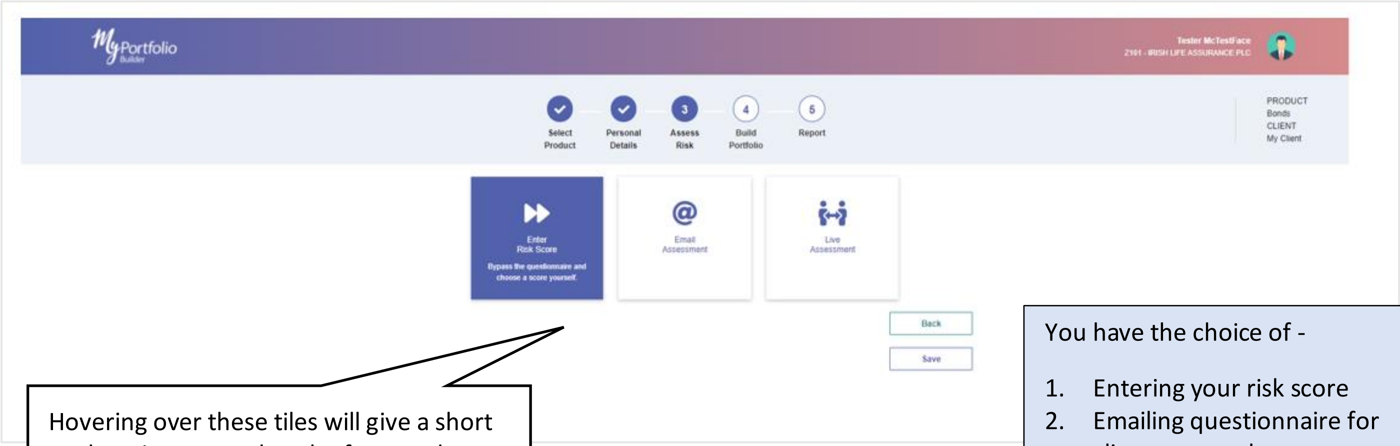
ASSESSING YOUR CLIENTS ATTITUDE TO RISK

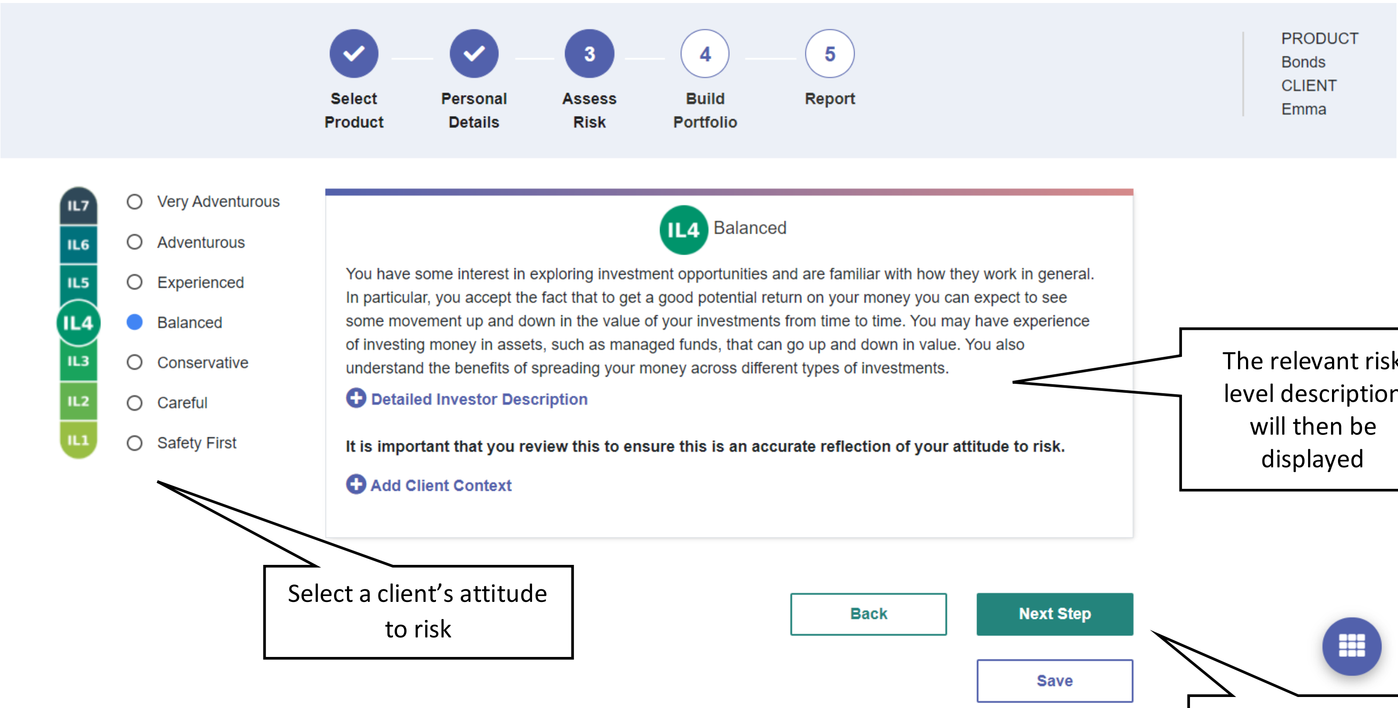


Hovering over these tiles will give a short explanation as to what the feature does. Selecting the tile brings you into that feature

You have the choice of -

1. Entering your risk score
2. Emailing questionnaire for client to complete
3. Doing a live assessment with the client

1. Enter Risk Score



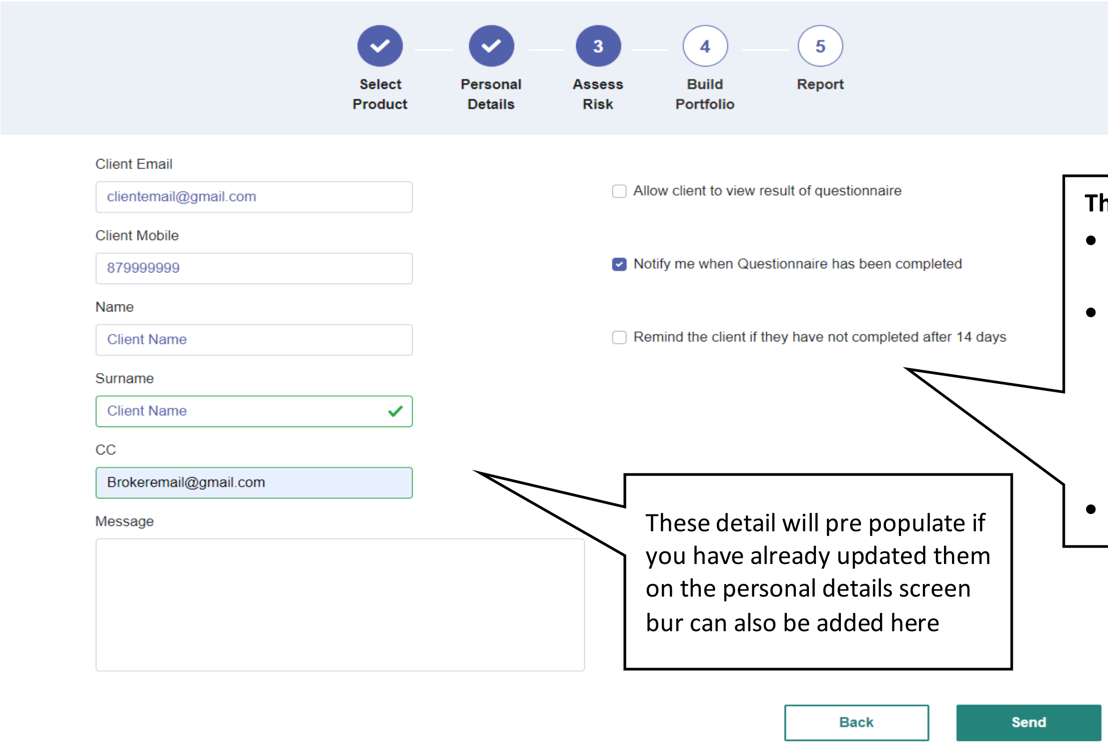
The relevant risk level description will then be displayed

Select a client's attitude to risk

You can save to the dashboard for both live assessment and remote completion

You have the choose to move to the **next step** or **save** to your dashboard

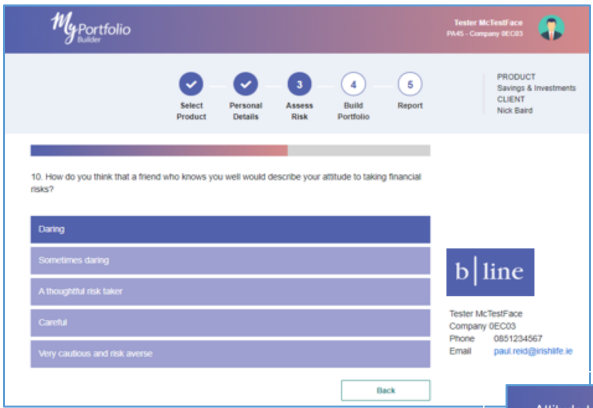
2. Emailing The Questionnaire



These detail will pre populate if you have already updated them on the personal details screen bur can also be added here

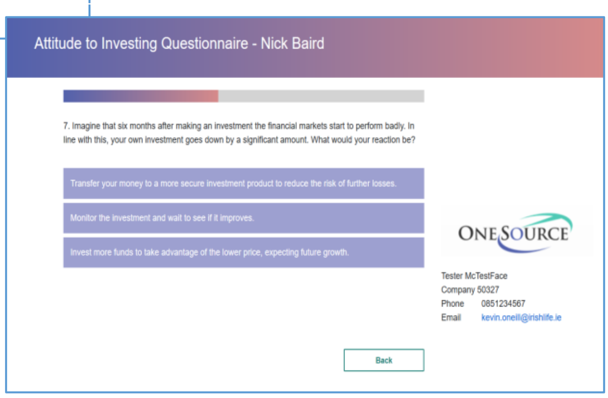
The Email Assessment

- Option to add own text to mail content
- Choose whether client sees results or not, automate a reminder email & select a notification when complete
- 2FA activation for security



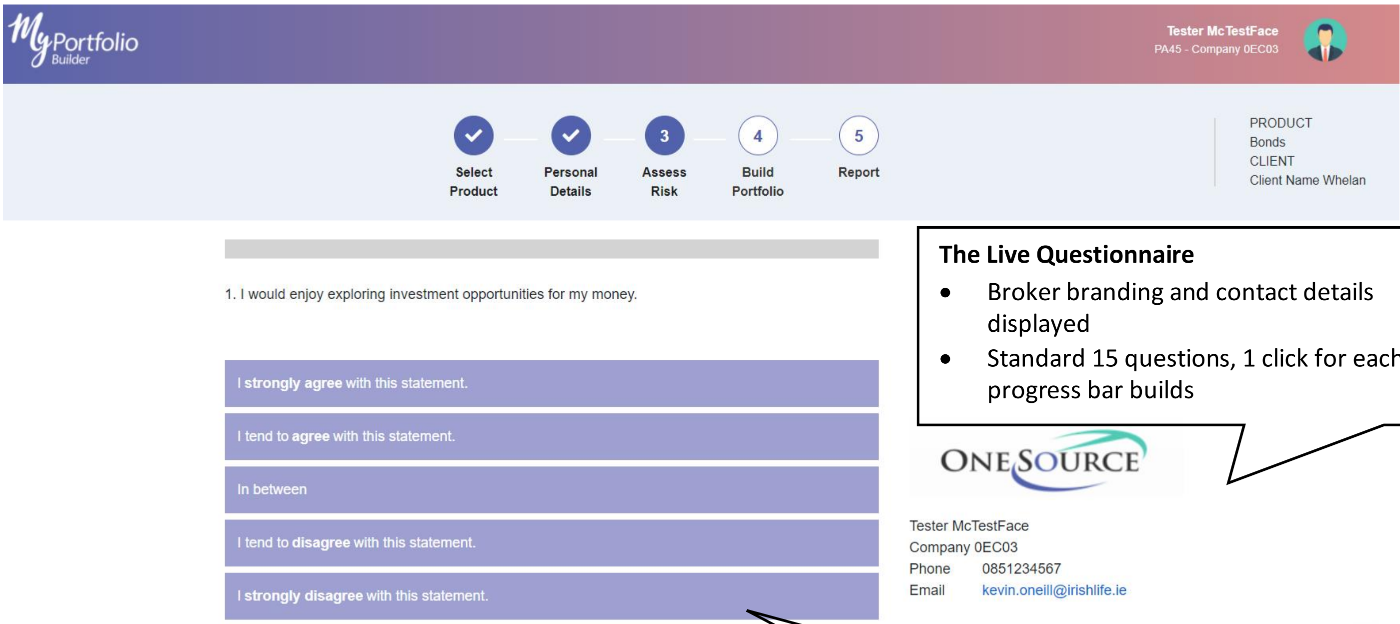
The Remote Questionnaire

- Personalised to the client when remotely completed
- Broker branding and contact details displayed
- Standard 15 questions, 1 click for each, progress bar builds



ASSESSING YOUR CLIENTS ATTITUDE TO RISK

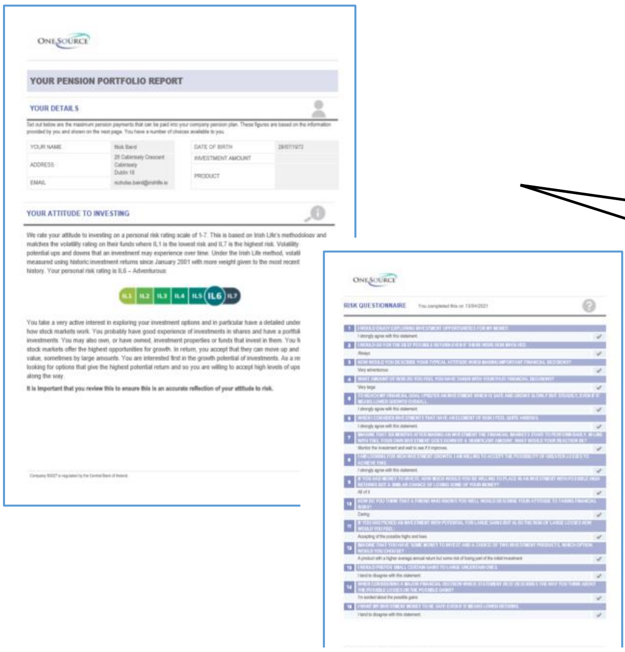
3. The Live Questionnaire



The Live Questionnaire

- Broker branding and contact details displayed
- Standard 15 questions, 1 click for each, progress bar builds

You can walk through the questionnaire in the presence of the client



Short Report
A short download of results and answers for both live assessment and remote completion