



JohnsonSavage  
ConsultancyLtd

a fresh approach to finance

## How to complete the Attitude to Risk Questionnaire:

Step 1: Login to your client portal



Advisers

Advisers



### WELCOME TO THE OPENWORK PARTNERSHIP

We're one of the largest financial advice networks in the UK. We've been ever-present in the financial advice market for over 45 years, giving us the experience to understand what it takes to help advisers and clients achieve their goals.

Johnson Savage Consultancy Ltd



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Next

Step 2: Click 'Next' underneath your advisers picture

You should then see the 'about us' screen



Advisers

About Us

My Details

Documents

My Advice

Secure Messages

About Us



#### WHO ARE WE?

The Johnson Savage Consultancy Ltd began life over 40 years ago as the Keith Savage Consultancy and has passed down a generation to Keith's daughter and son-in-law, Melanie and Paul Johnson back in May 2012.

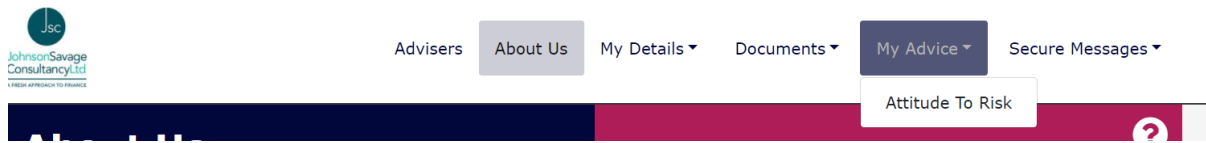
At the core of our business is clients' well-being, both financial and personal. We have a carefully selected team of Financial Planners who specialise in their own areas of expertise and who are available to explain complex matters in a clear and friendly way.

Our offices are based in Claverdon, Warwickshire and we encourage our clients to call in and meet all of the members of our team, including our support team who provide a valuable role to both our financial planners and clients alike.

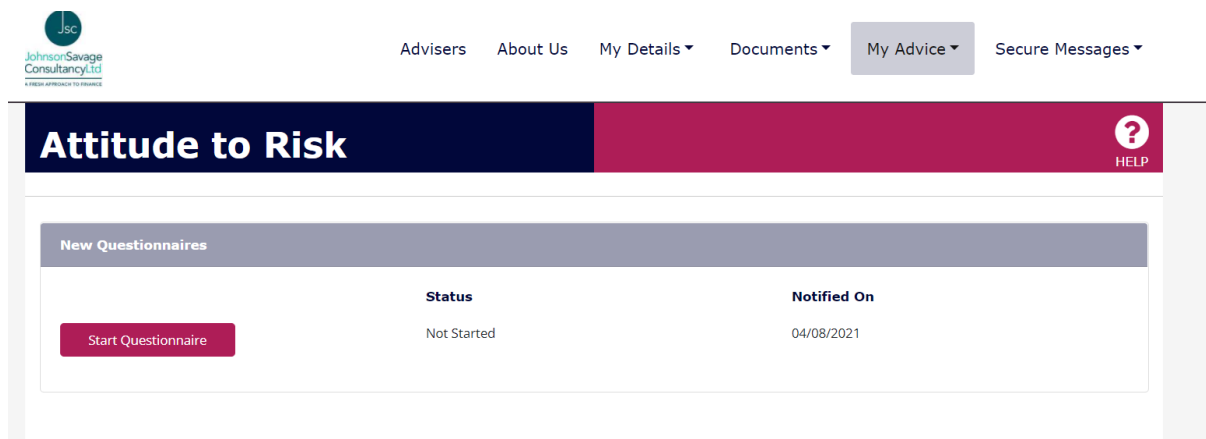
Outstanding customer care is a key part of our business and this is evidenced by having clients spanning three generations with whom we have built longstanding relationships.

Our aim is to provide financial planning solutions and ongoing support with clear recommendations and communications to help you plan for your financial future.

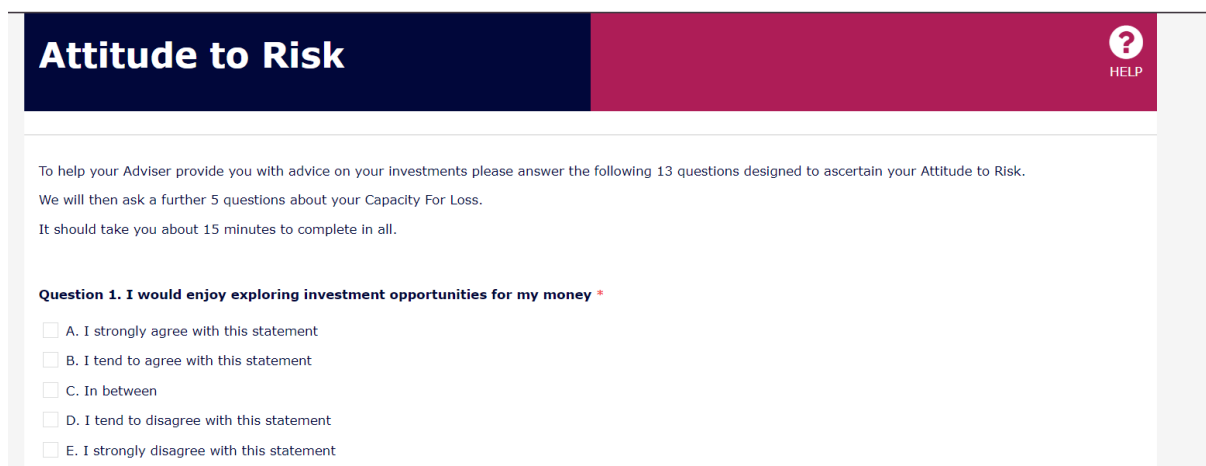
**Step 3:** On the tabs along the top, click on 'My Advice' and you will have the option to click on Attitude to Risk



**Step 4:** You will see a 'start questionnaire' button, click on this



**Step 5:** This will then open the questionnaire for you to complete the questions. There are 2 sets of questions to complete the first set assesses your Attitude to Risk, the second your Capacity for Loss:



**Step 6:** Once you have completed the first set of questions, you will see the below screen. Click on the 'Continue Questionnaire' to move to the second set of questions:

## Attitude to Risk Results

Attitude to Risk Results

Thank you for completing the questionnaire. Your responses suggest an attitude to risk of: **Limited Risk**

There is a **5%** chance of being **Cautious**

There is a **0%** chance of being **undefined**

You are likely to require an investment where the chance of a fall in value is minimal, although you accept that some loss of capital is possible as the value of your investments could fall or rise.

You would normally keep your money in a bank account or building society. However, you recognise that inflation, especially over the long term, is likely to reduce the real value of your money so you are willing to consider other types of investment.

As a limited risk investor, you may not have high levels of knowledge and experience of financial matters, or show interest in keeping up-to-date with them.

Investors who wish to limit risk can take a relatively long time to make up their mind on investment matters and can often feel concerned when investment decisions turn out badly.

Please refer to the "Making More of Your Money Booklet" which explains this in more detail. An electronic version of this document can be found in the Openwork Documents section of the Document Library. You will find the Document Library under the Documents tab

Typical Asset Mix



Investment Type	Percentage
Capital Guarantee Investment	100%

Continue Questionnaire

**Step 7:** once you have completed both sets of questions you will see the below screen. Please click Finish, and this will send the results back through to your adviser:

## Risk Assessment

Thank you for answering both sets of questions.

Your Adviser will be informed of your Attitude to Risk and your answers to the Capacity for Loss questions. They will speak to you about it in more detail when they discuss your investment needs with you.

Finish

**Step 8:** Now that you have completed the questionnaire – if you go back to the attitude to risk tab through the ‘My advice tab as seen in step 3, you will see your completed questionnaire available to view:

# Attitude to Risk

HELP

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Completed Questionnaires

	Status	Completed On
<a href="#">Results</a>	Complete	04/08/2021