SYNAPTIC RISK

Synaptic Risk

Quick Start Guide

STEP 1.

www.synaptic.co.uk

- Passwords must have at least 8 characters, including a capital letter and number.
- After 3 incorrect attempts your account will lock out for 15 minutes.
- If you require a password reset, please contact the Support team.

Risk Table

A downloadable table of risk rated funds and portfolios for use by advisers with their clients.

Risk Fact Sheets that detail the asset allocation breakdown and ‘Capacity for Loss’ quotient of rated funds and portfolios.

TECHNICAL SUPPORT
t: 0800 028 0033 e: support@synaptic.co.uk

SALES & CUSTOMER SERVICES
t: 0800 783 4477 e: customerservices@synaptic.co.uk

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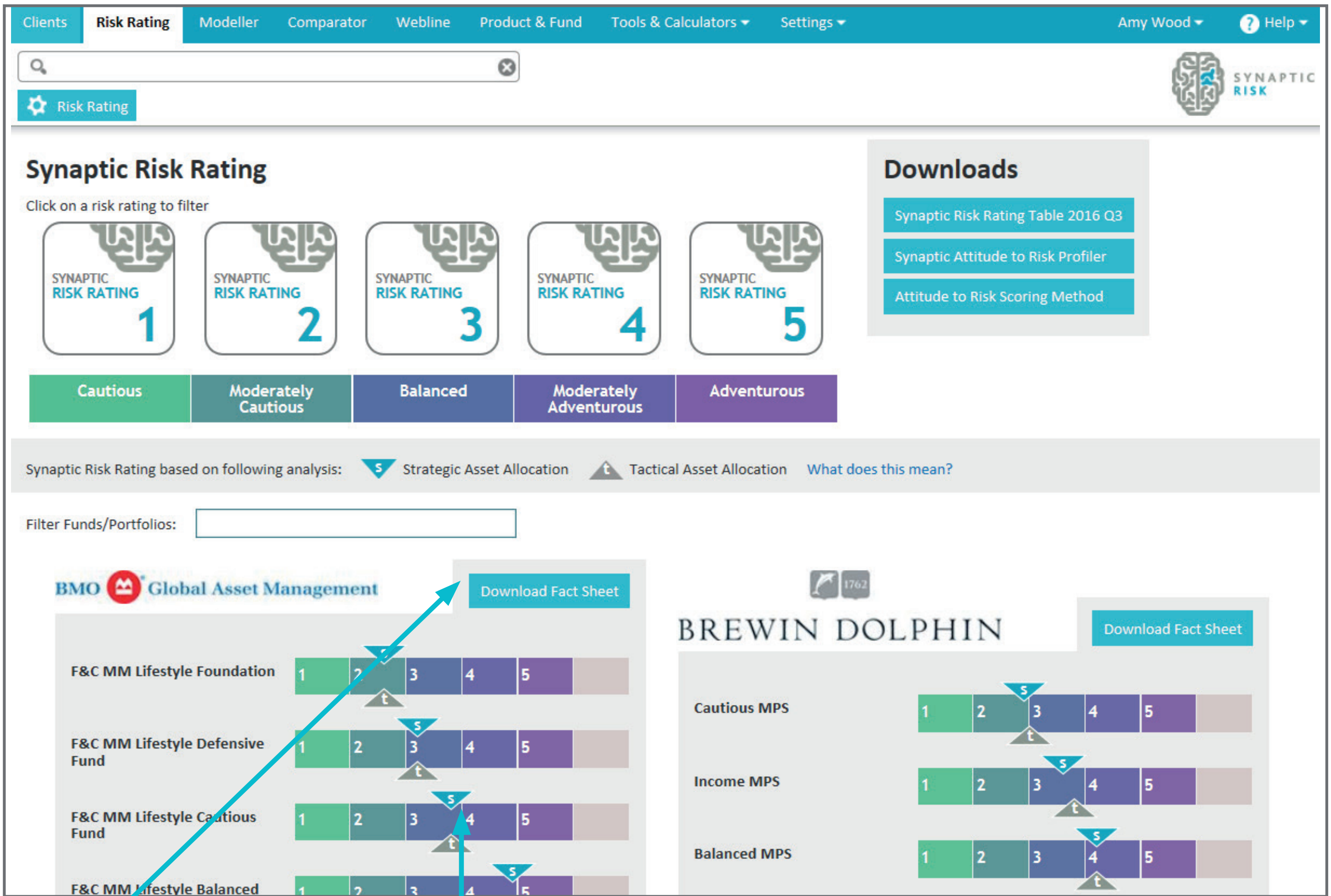
STEP 2.

It is the responsibility of the adviser to ensure that the level of risk their client is exposed to is appropriate for their circumstances.

The online Synaptic Attitude to Risk Questionnaire (see overleaf) can assist in performing and saving a client risk appraisal, and the risk analysis provided in these fact sheets (see below) can assist in identifying a suitable investment.



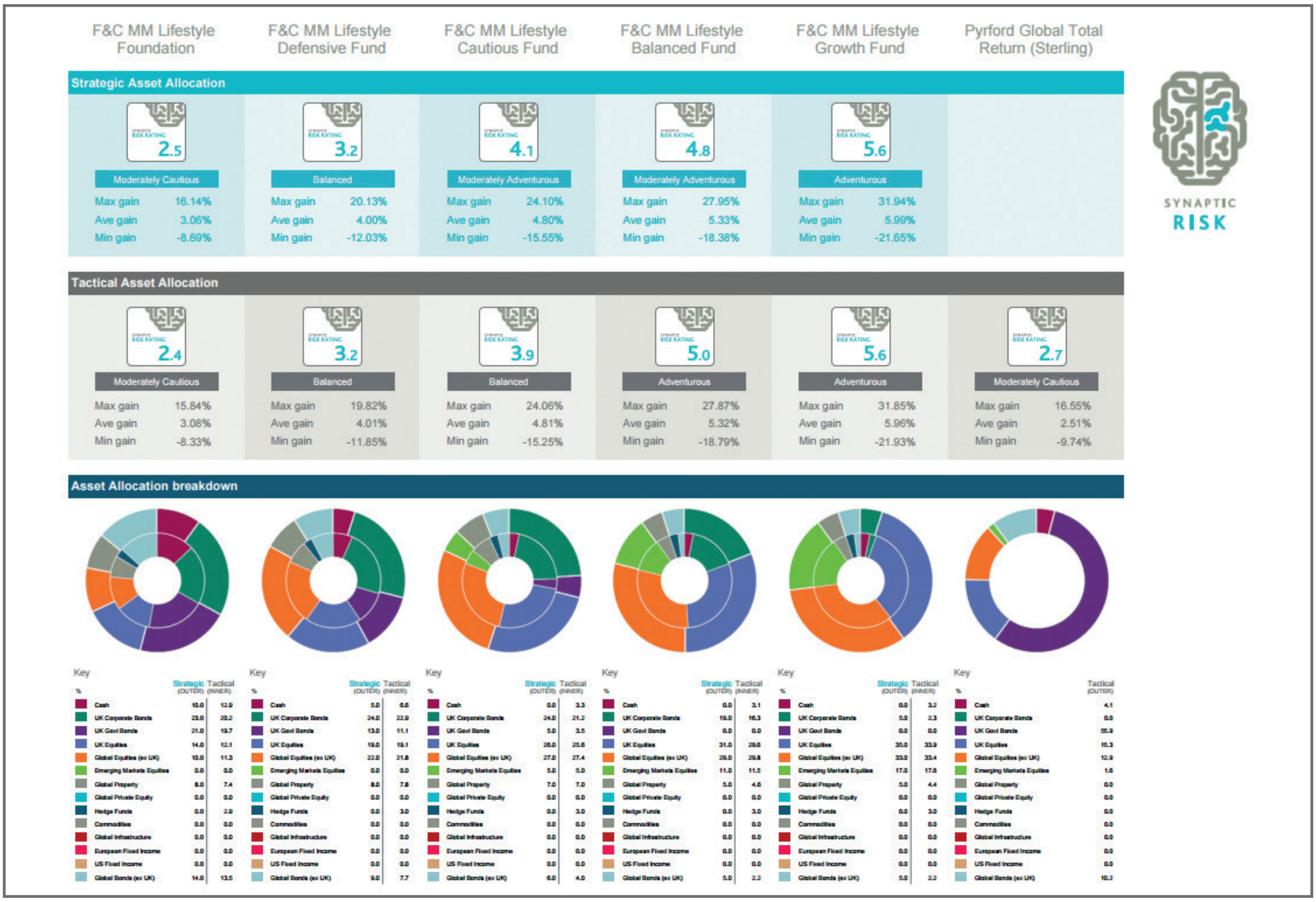
You can download factsheets under each fund promoter

Within each fund promoter factsheet, there are several funds/ portfolios. They are risk rated by the following:

S Strategic Asset Allocation   t Tactical Asset Allocation

STEP 3.

Factsheet example



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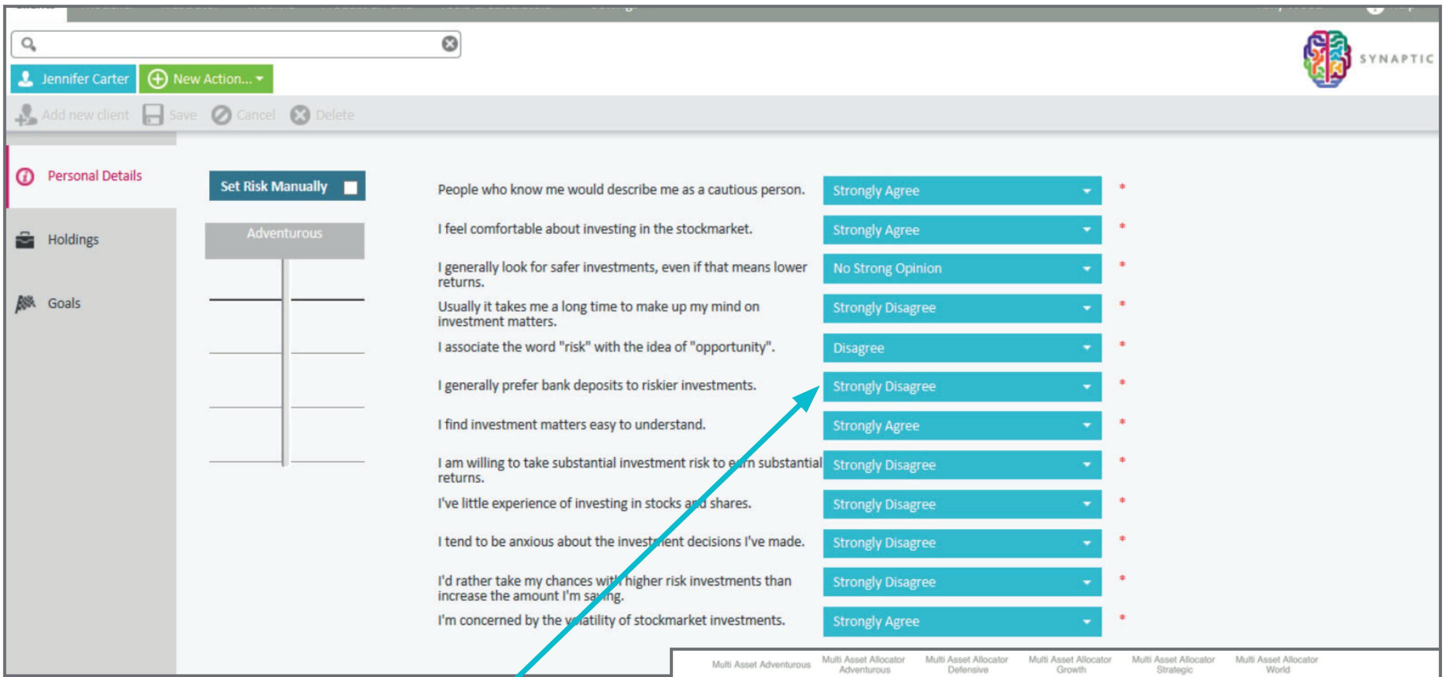
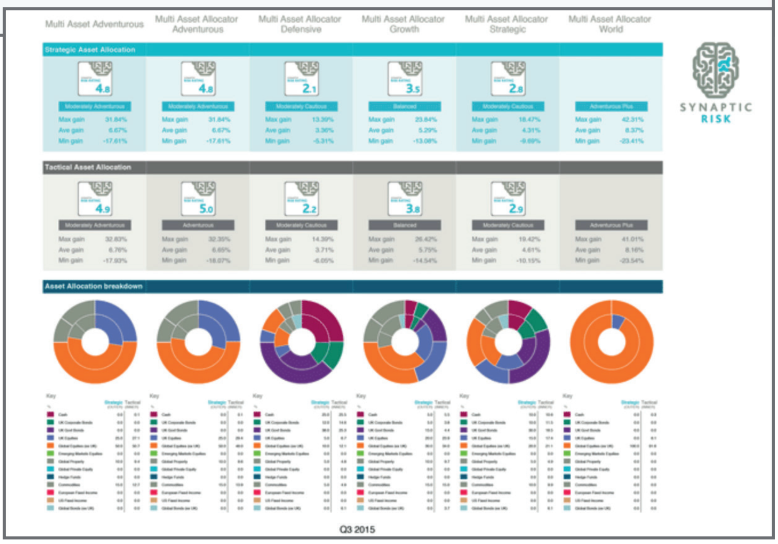
STEP 4.

Attitude to Risk Questionnaire

Access to the client module, where an attitude to risk questionnaire can be completed for your client. Once you have identified your clients attitude to risk, a report can be generated.



Answer each question by selecting the response from the dropdown, the attitude to risk scale on the left will adjust as you answer. Alternatively you can set the risk level manually



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