

# Release Notes

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## Release Version

v1.0

## Release Date

March 2025

## Summary

The first production release of the Risk Profiling & Suitability Engine. It delivers core functionality including dynamic questionnaires, risk scoring, suitability checks, and advisor/client-facing UI.

## New Features

- Dynamic Risk Profiling Questionnaire
- Scoring Algorithm mapped to investor profiles
- API-integrated Suitability Engine
- Audit trail and override workflow
- UI for advisors and clients

## Bug Fixes

- Fixed questionnaire responsiveness issues on tablet
- Addressed scoring edge case for high-risk clients

## Enhancements

- Improved navigation with Save/Resume option in questionnaire
- Optimized API response time for profile submission
- Enhanced advisor dashboard with suitability flags and audit logs

## Known Issues

- Mobile UI tweaks pending for next release
- Localization/internationalization for additional jurisdictions

## Deployment Instructions

1. Deploy backend services to production environment
2. Run database migration scripts for scoring and questionnaire tables
3. Configure API keys and CRM integration endpoints
4. Validate audit trail module with compliance team before go-live

## Contact for Support

For support, please reach out to:

- Product Owner: [product.owner@example.com](mailto:product.owner@example.com)
- Technical Support: [support@example.com](mailto:support@example.com)