DYNAMIC PLANNER SUPPORT HUB

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Client Profiling

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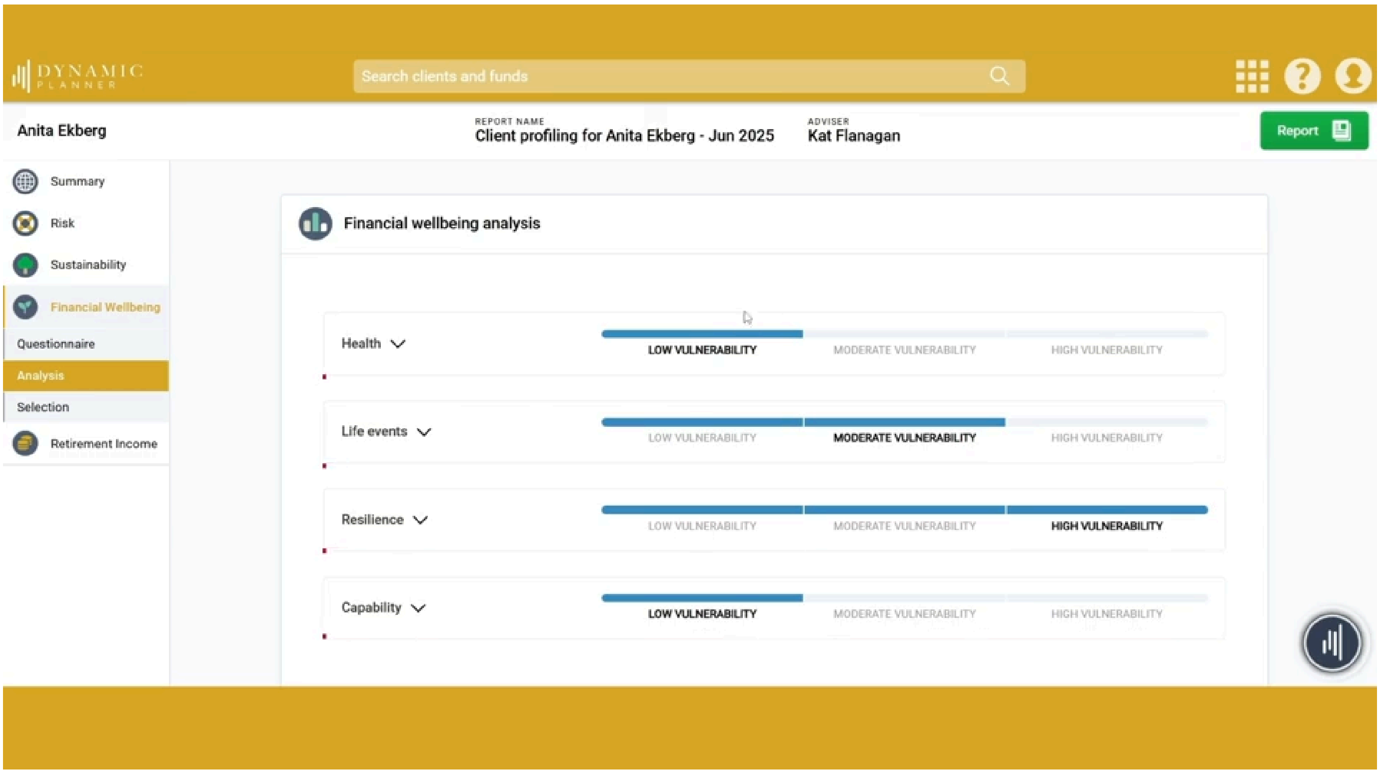
Financial Wellbeing Questionnaire

Use this questionnaire to asses your clients' vulnerability and understand how you can support them. Find out more in our Introduction to Dynamic Planner Financial Wellbeing Questionnaire document.



Welcome to the Dynamic Planner on demand training series.

The Financial Wellbeing Questionnaire has been designed in collaboration with the FCA and the University of Reading.

It consists of 39 questions split into four areas: health, life events, resilience and capability.

The first two sets of questions are designed to gauge the impact of a client's health conditions and life events on their daily lives, rather than just identifying the presence of those factors. The last two sets of questions explore subjective aspects of vulnerability, such as your client's confidence and emotional resilience. This allows for a more accurate assessment of their current vulnerability.

On the Analysis page, you will see a breakdown of each vulnerability driver which is scored from low to high. Click on the arrows to view which characteristics are influencing these results and to understand how you can support your client.

On the Selection page, you have the opportunity to document if your client is in vulnerable circumstances or not, or if you are unsure at this point and require further information. If you select in vulnerable circumstances, this status will then be reflected on the client dashboard, provided you update the client plan during the report download process.

On this page, two separate notes sections are available for you to complete. In the Assessment tab you can document information for internal use and set a reassessment date, which can be yearly, half-yearly, quarterly or no date.

The Support for your client tab is for external use. In this tab, you have the option to use the standard text provided or add your own notes to detail the actions you'll take and support you'll offer your client.

Frequently asked questions

If you have any questions, please contact the Support team.

How do I add in my firm's logo to my reports?

How do I create themes for my firm's reports?

Can I copy themes to different reports?

How do I do joint planning for my clients?

For a joint client do they both need to complete the questionnaires or can one complete for both?

I have updated a report but the changes are not showing up when I generate it.

I have downloaded the report in Word but the page numbers on the index page appear as #.

My clients have completed joint questionnaires via a joint Fact Find Invite, can I still risk profile them separately?

When I click 'Use previous answers', the drop down menu shows the date and time of completion followed by risk profile 0 (Client completed), why is there no risk profile?

Where can I get historical growth rate figures for the Dynamic Planner risk benchmarks?

Choose a different support topic

Select one of the eight support topics or scroll down to our "getting started" section or our latest live webinar listings.

Client Profiling

Risk profile your clients, understand their sustainability preferences, assess their vulnerability and define their retirement income priorities.

Fact Find

Send a request to a client, inviting them to complete the questionnaires or provide information. Change default branding and text.

Client Review

Start a new review. Check valuations. Set objectives and outcomes. Create and customise reports, ready for email or print.

Integrations

Set up credentials for platform and provider valuations requests or enable integrations with your back office / CRM.

Cash Flow

Start a new cash flow plan. Identify the impact of savings, investments and intended spending on a client's goals.

Fund Search

Research investment solutions. Manage shortlists and model portfolios. Understand Dynamic Planner's fund badges.

Product Research

Research products and providers from across the market. Create target market reports and manage product lists.

Recommendation

Record recommendations for changes to a client's portfolio. Generate a report, customised with your notes.

Resources

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