

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.

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