|  |  |  |
| --- | --- | --- |
|  |  |  |
| **Need to take risk:** | **Grading (High/medium/low)** | **Adviser assessment** |
| **Capacity for loss:** | **Grading (High/medium/low)** | **Adviser assessment** |
| **Attitude to risk:** | **Grading**  **(Per risk categories)** | **Client(s) declared emotional risk tolerance** |
|  |  |  |
| **Outcome:** | **Grading**  **(Per risk categories)** | **Ensure that where attitude to risk does not equal capacity for loss detailed notes are provided explaining final recommendation:** |
|  |  |  |

**Risk Profile Outcome**

|  |  |
| --- | --- |
| **Client agreement:** | I / We have discussed my / our risk profiles with the adviser and agree that currently, we believe the above assessment gives us the best chance of meeting our objectives and we agree to implementing an investment solution based on the above outcome. |
| **Client Signatures:** |  |
| **Date:** |  |
| **Adviser Signature:** |  |
| **Date:** |  |