

risktype
compass™

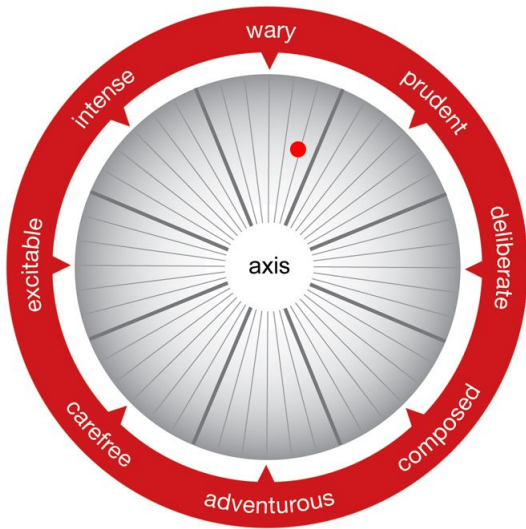
Financial Adviser Report



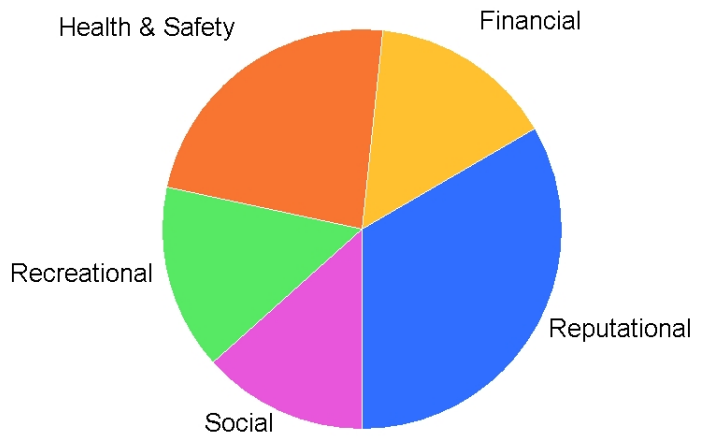
Simon Sample



Risk Type Compass® Summary



How much risk they are likely to take

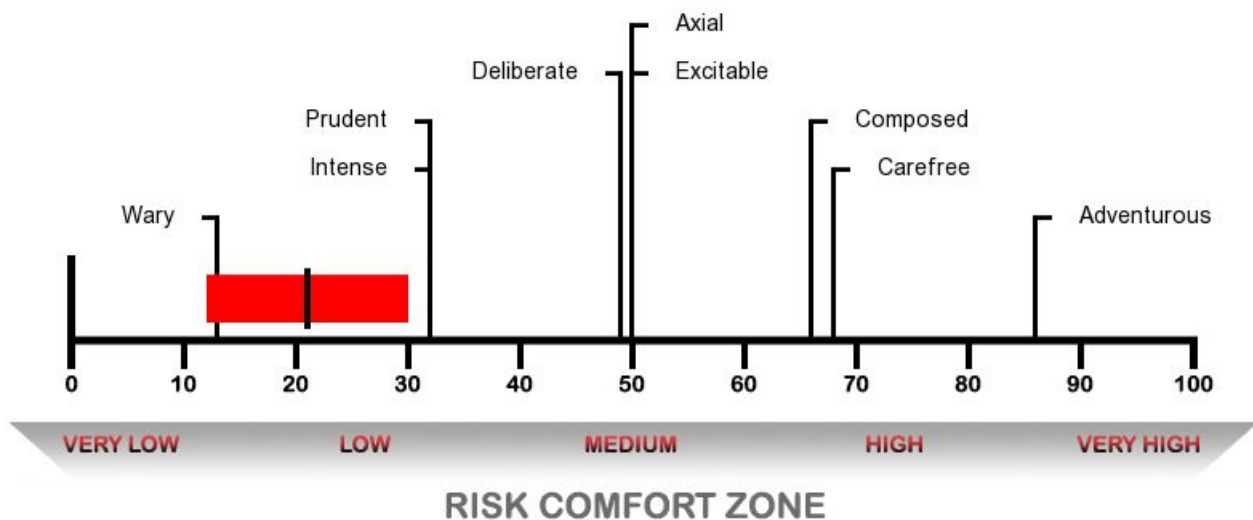


Where they are likely to take most risks

Implications for client management:

- This Risk Type is anxious and apprehensive but well organised
- Having tendencies towards pessimism and self-doubt they should welcome expert advice
- Their methodical approach will be well served by detailed information and explanations
- Their thoroughness may make them slow to act and you may need to be patient
- High levels of anxiety may require careful explanations about the risks of an investment
- Work to establish trust to keep things on an even keel emotionally
- Don't attempt to rush things, a measured and supportive approach will be appreciated
- Anticipate a cautious, methodical approach to investment

Risk Tolerance index (RTi)



The responses to the items on the Risk Type Compass® Consistency scale indicate that the profile is valid and interpretable.