

risktype
compass™

Financial Advisor Report



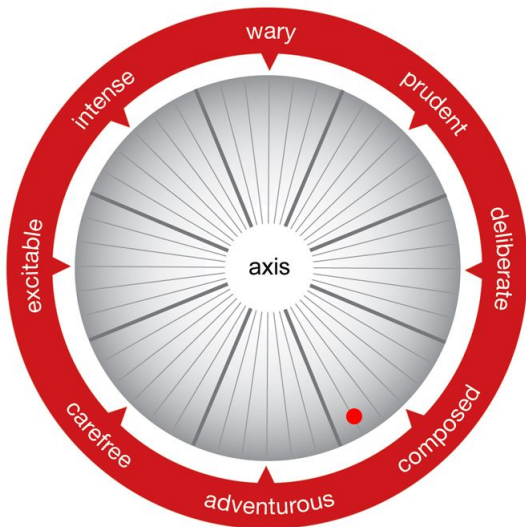
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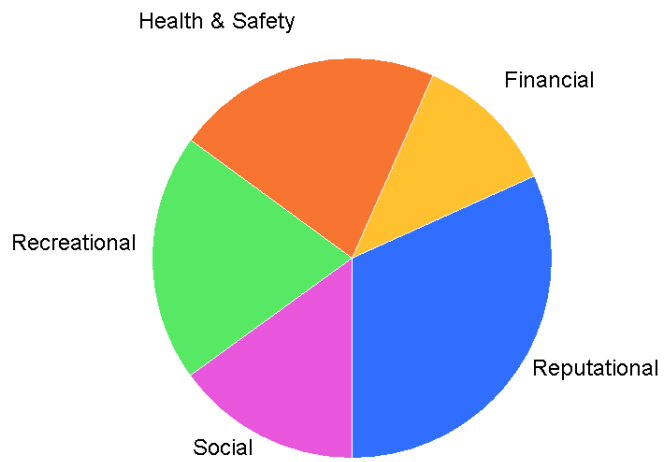
Sophie Sample



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 confident, calm and resilient
- They are likely to remain surprisingly composed, even in the face of loss
- Anticipate that they may be willing to consider high risk ventures
- They may be keen to press ahead before appreciating all the implications of an investment
- Their self-confidence may sometimes overstate their actual competence and expertise
- Being self-assured and optimistic, you may need to rein in some of their enthusiasms
- Be clear about any potential investment risks; this type may not be very sensitive to risk
- Self contained and even tempered, they should be relatively philosophical about losses

Risk Tolerance Index (RTi)

