

risktype compass™

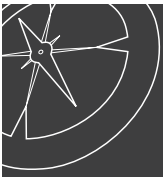
Financial Adviser Report



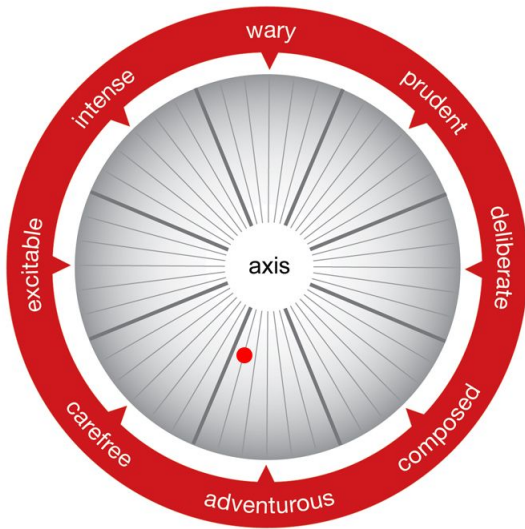
PCL | 8 Mount Ephraim | Tunbridge Wells
Kent | TN4 8AS

www.psychological-consultancy.com

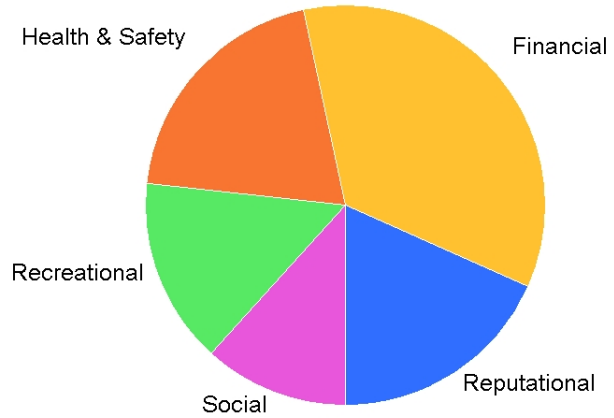
Sam Sample



Risk Type Compass® Summary



How much risk they are likely to take

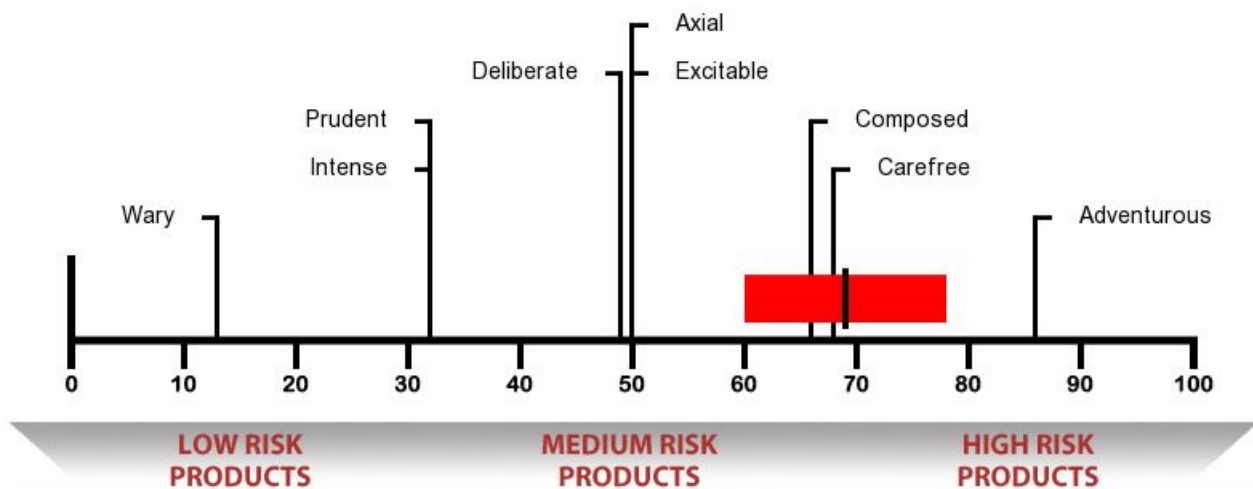


Where they are likely to take most risks

Implications for client management:

- This Risk Type is casual, composed and venturesome
- Anticipate that they may be willing to consider high risk ventures
- Some will be inclined to overrate their competence and expertise in finance
- They may be keen to press ahead before fully appreciating all the implications
- Being self-assured and optimistic, you may need to rein in some of their enthusiasms
- Their finances and associated documentation may not always be well organised
- You may need to reiterate important points to ensure they are understood clearly
- They may not be inclined to read the small print and dislike filling out forms

Risk Tolerance index (RTi)



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