



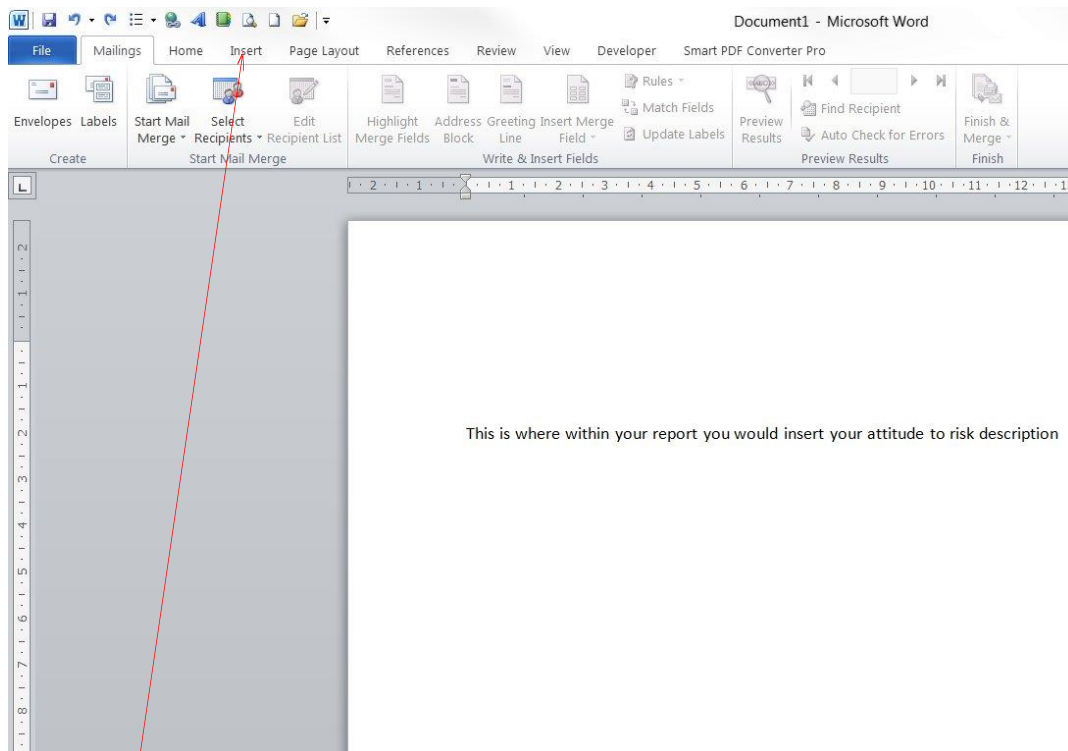
Planning for you, working for your clients

Helpful Word Insert

- 1) Set up separate word documents which have your risk profile descriptions in them

	ATR1	19/09/2014 14:37	Microsoft Word D...	14 KB
	ATR2	19/09/2014 14:41	Microsoft Word D...	14 KB
	ATR3	19/09/2014 14:41	Microsoft Word D...	14 KB
	ATR4	19/09/2014 15:01	Microsoft Word D...	14 KB
	ATR5	19/09/2014 15:02	Microsoft Word D...	14 KB
	ATR6	19/09/2014 15:02	Microsoft Word D...	14 KB
	ATR7	19/09/2014 15:02	Microsoft Word D...	14 KB
	ATR8	19/09/2014 15:03	Microsoft Word D...	14 KB
	ATR9	19/09/2014 15:03	Microsoft Word D...	14 KB
	ATR10	19/09/2014 15:03	Microsoft Word D...	14 KB

- 2) Whilst in the report you are writing:

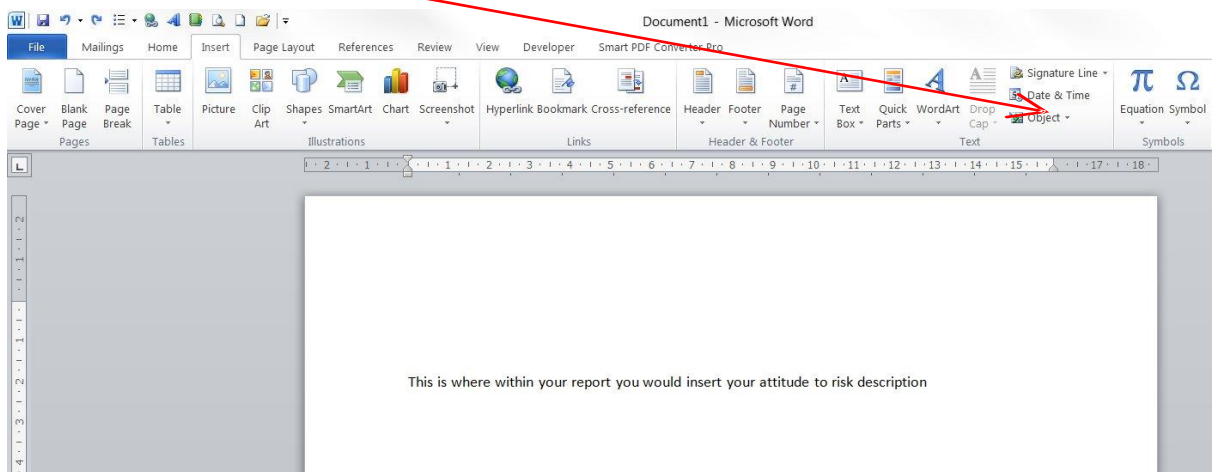


Select the Insert Tab

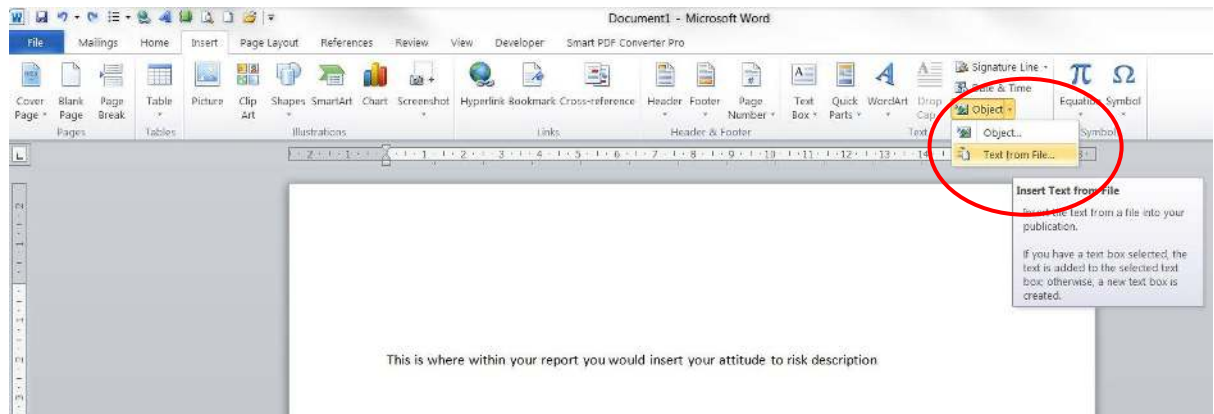


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3) Go to Object



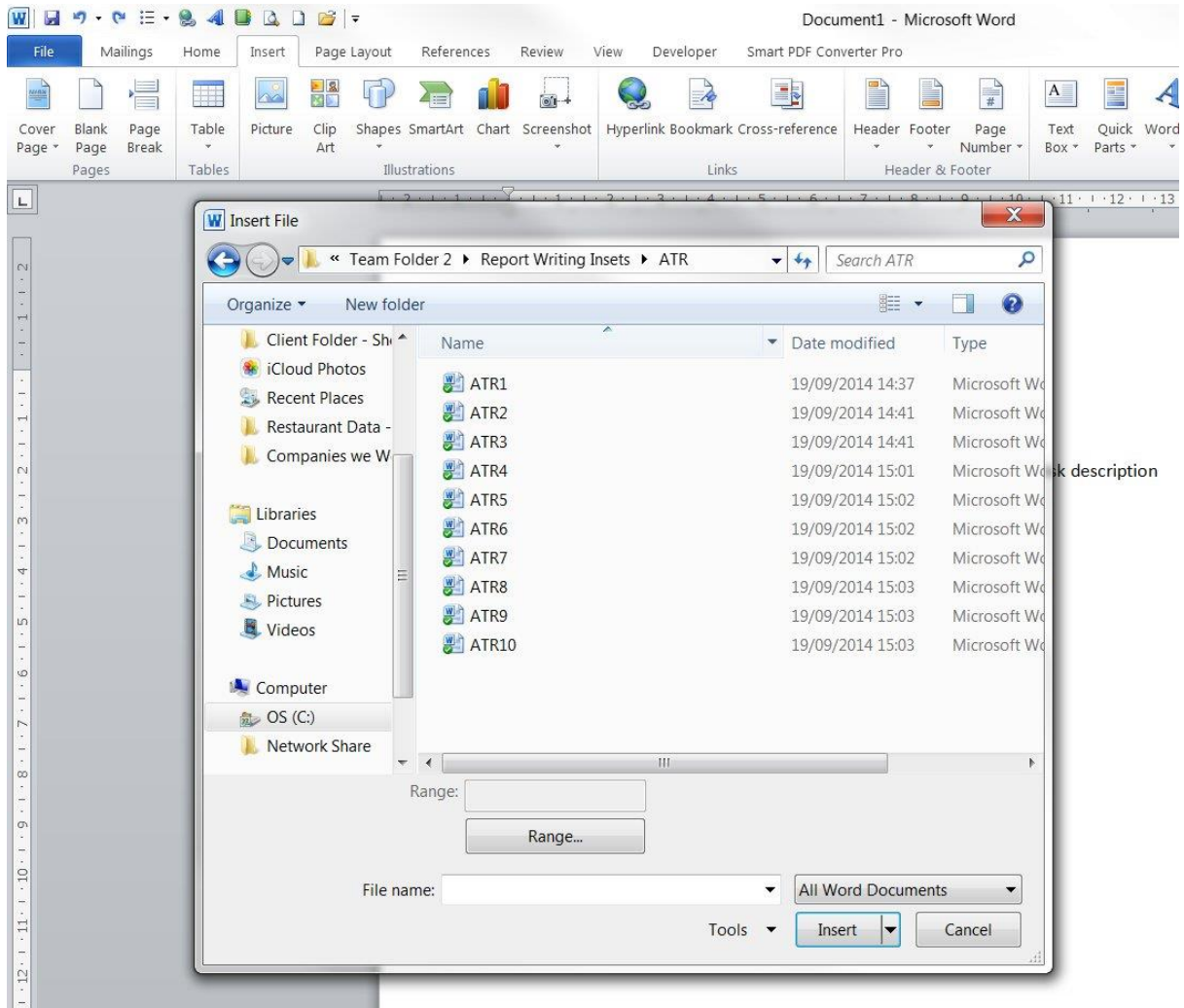
4) Select Text from File





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5) Find the file you want to insert





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Hey Presto!!!

This is where within your report you would insert your attitude to risk description

Risk level: 4	
You are prepared to take some investment risk in order to increase the chances of achieving a reasonable return but would still like to ensure that capital protection is still considered. A typical Risk Level 4 investor will be invested in a moderate amount of fixed interest, but with a greater proportion in equities and property. At the shorter terms there may also be some cash. The table below illustrates the capacity for loss and gain for the recommended asset allocation against your risk tolerance on a sample investment amount over a twelve month period.	
Portfolio value	£100,000
Maximum potential loss	£4,800 (4.8%)
Maximum potential gain	£19,300 (19.3%)
Mean Return	£6,500 (6.5%)