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Frequently asked questions about the Elevate risk assessment tool

The risk assessment tool is available at riskapp.elevateplatform.co.uk

Standard Life
There's a lot to look forward to

Here are some commonly asked questions about the risk assessment tool, and their answers.

1. Can my clients use the risk assessment tool?

No, this tool has been designed especially for professional financial advisers. The outputs are designed to inform the risk discussions you have with your customers, rather than operate as a substitute for such a discussion.

2. What is included in the risk assessment tool?

The risk assessment tool consists of a psychometric attitude to risk (ATR) questionnaire, which delivers an ATR score and risk rating. It provides detail of a corresponding set of suggested optimised asset allocations for each risk rating.

3. How has the ATR questionnaire been designed?

The questionnaire is provided by eValue a professional services firm with expertise in risk, asset allocation and financial planning tools. The questionnaire consists of 18 simple questions that are scored to produce a risk rating between either 1-7 or 1-10, depending on which risk scale you select to use.

4. Why are both a 1-7 and 1-10 risk scales available?

Elevate offers adviser firms the option to use either a 1-7 risk scale or 1-10 risk scale to meet the needs of their client proposition and business processes. Both the risk assessment tool and the Elevate platform can be configured to return results on either the 1-7 risk scale or 1-10 risk scale.

5. Where can I find further information on the risk tool, asset allocation model and the methodology that underpins them?

More information on Elevate's risk profiling process can be found in the 'Risk questionnaire and asset allocation tools Technical guide'.

6. What is the most efficient way of accessing the tool?

Once you've accessed the web app from your browser for the first time, we encourage you to bookmark the site for future quick access or, if you're using a mobile device, add a direct link to your home screen.

7. Why have my saved risk assessments been deleted?

If you delete your cache, or there is a technical problem with your device, any saved risk assessments will be lost. We recommend you get into the habit of emailing yourself a copy of each client's report, to be on the safe side.

8. I use the tool on different devices. Why can't I view all of my completed risk assessments?

Reports are saved to each device you use. If you want to have all your reports in one place we recommend you email them to yourself as you go along and save them somewhere convenient.

9. Is the application available offline?

Yes, you can use the tool offline but you need to access it once online first, so it's then saved to whichever device you want to use.

A breakdown of functionality over different browsers is shown below:

Browser	Offline access	Local storage
IE8	X	✓
IE9	X	✓
IE10	✓	✓
IE11	✓	✓
Safari (iPad and iPhone)	✓	✓
Chrome and Firefox	✓	✓

10. How can I print my client's report?

You can't print directly from the application but reports can be emailed and then printed.

11. How often is the tool updated and do I need to do anything to ensure it happens?

The tool is updated on a quarterly basis. Updates are done automatically so you needn't do anything.

12. Is this the same risk assessment tool that is available from the Elevate platform?

Yes, it's the same tool, provided by eValue. More information on Elevate's risk profiling process can be found in the 'Risk questionnaire and asset allocation tools Technical guide'.

13. Do I need to pay for the application?

No, it's free to use.



Get to know us better

We hope you've got a good insight into our platform and the potential benefits it can bring to you and your firm.

If there is anything more you want to know, please contact us.

Call us on 0345 600 2399

Our lines are open 8am to 6pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at Elevate_Enquiries@standardlife.com

Please be aware that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

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