

1. Risk profile

Use your preferred psychometric questionnaire to ascertain your clients' natural attitude to risk, then model likely outcomes using Moody's stochastic engine.

2. Review

Import details of your clients' existing portfolios and review them against their agreed Risk Profile, to understand if their needs are still being met or rebalance if required.

3. Research

Choose from several fund selection methods mapped to your clients' Risk Profiles, providing flexibility on investment strategy to meet your clients' objectives in line with your CIP.

4. Report

Engage has followed every step to automatically produce an audit trail, from risk profiling through to research, to evidence the due diligence conducted in choosing a solution.



Attitude to risk (ATR)



+



Required outcomes

+



Capacity for loss

=



Agreed Risk Profile



Import existing holdings



Review against Risk Profile



Record justification to rebalance if applicable



Adviser-led model portfolios



Risk optimised single asset

OR



Defaqto risk rated DFM managed portfolios



Defaqto risk rated multi-asset funds

Some of the 600 Defaqto risk rated multi-asset fund and DFM managed portfolio providers



plus many more



Recommend



Questionnaire answers



Projection graphs



Agreed Risk Profile



Existing holdings analysis



Fund research criteria



defaqto.com/advisers

Accumulation workflow

defaqto ENGAGE