

Letter introducing Risk Profiling to your clients

Dear client,

This is the second questionnaire we are using to create your plan for aging. It takes about 15 to 20 minutes to complete. Please click this link when you are ready to start: <Put link here>

The “Risk Profile” is a questionnaire developed by specialists in geriatric psychiatry at a major US hospital that is designed to identify traits that may put you at risk for poor financial decision-making or financial fraud.

This initial questionnaire establishes your “baseline”. If we identify any decision-making issues early, we can provide you with education to improve your financial literacy which can extend your ability to manage your finances longer. Additionally, if there are other concerns, we will refer you to the appropriate specialists.

We will ask you to repeat this assessment every couple of years to make sure you continue to do okay. It is also a good way to measure your success in addressing behaviors that may put you at risk for fraud or abuse.

Please let me know your questions and concerns. As soon as I receive notification that you have completed the questionnaire, I will reach out to you.

Best regards,

Adviser

