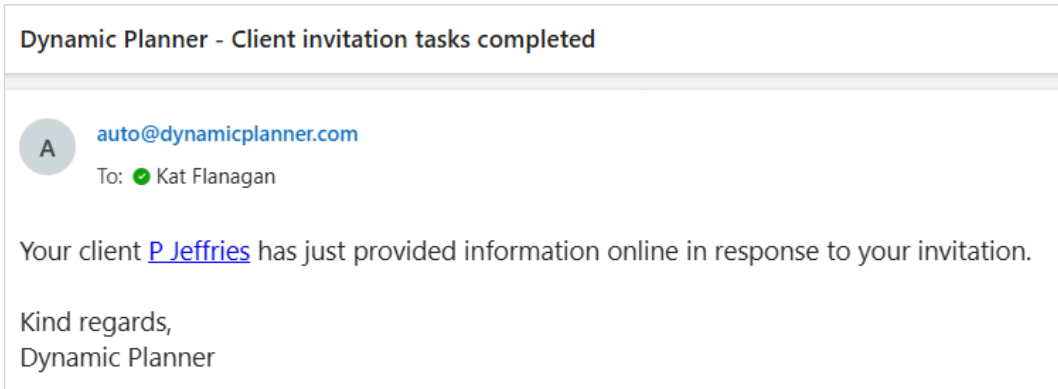
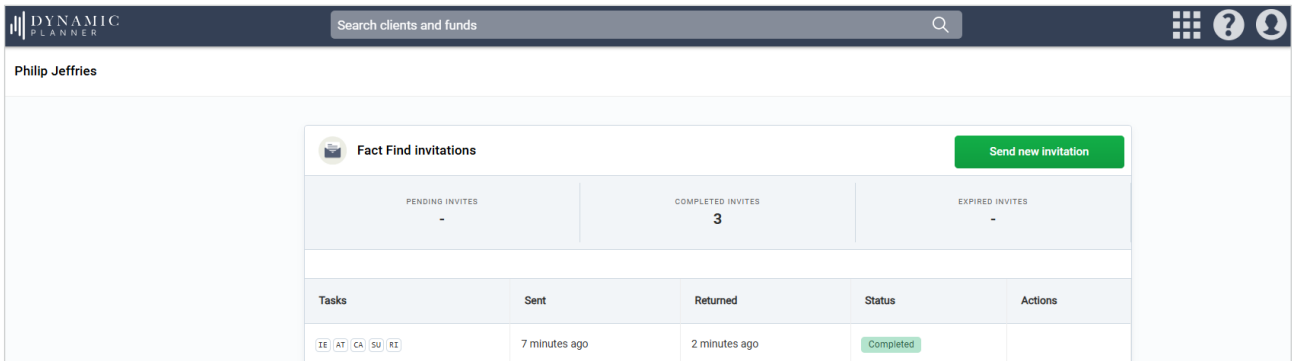


# Importing responses from questionnaires

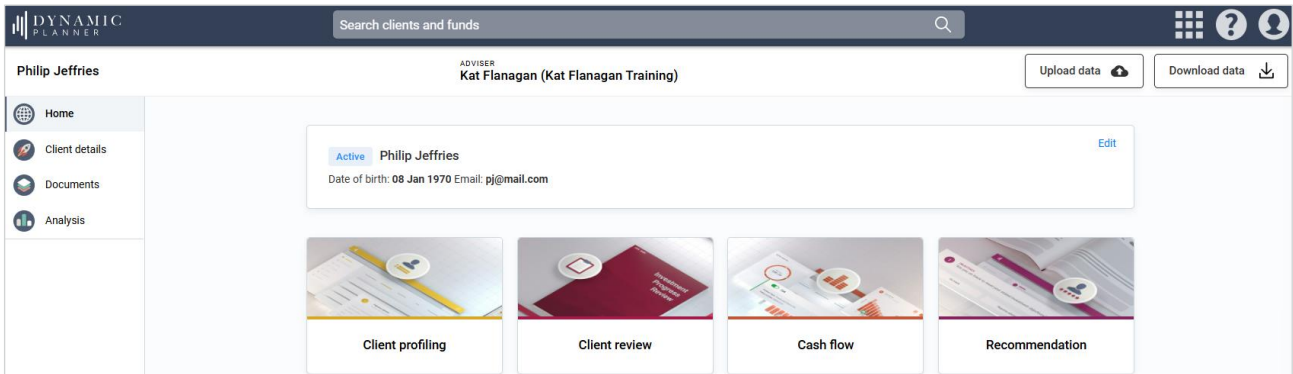
When you receive notification that your client has completed the questionnaires, click on the [blue link](#) in the email.



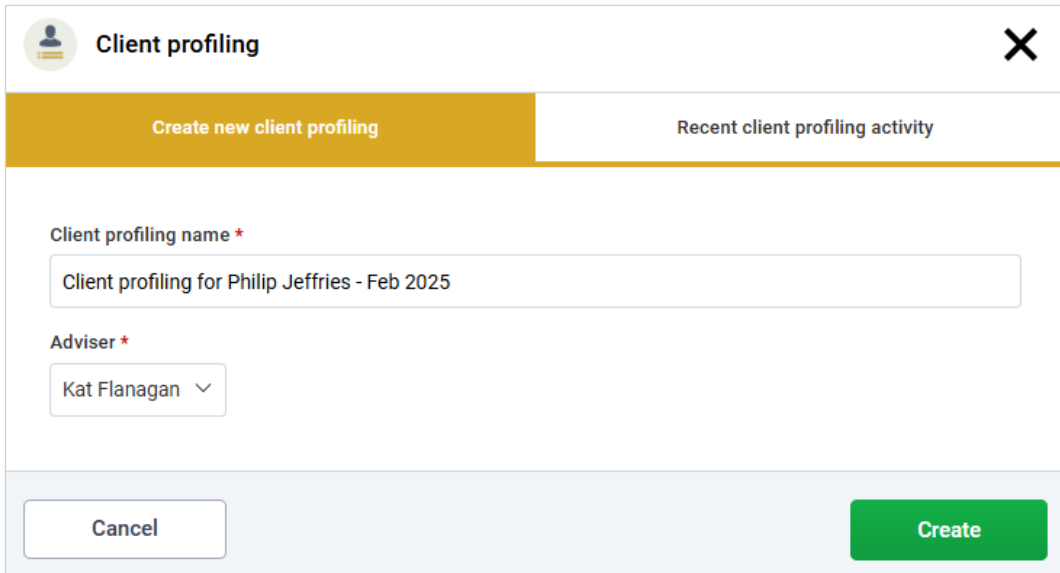
You will be taken to the **Fact Find Invitations** page in Dynamic Planner. Click on the **client's name in the top left corner**.



You will land on the Client Dashboard. To import the client's responses, click on **Client Profiling**.



Click **Create**



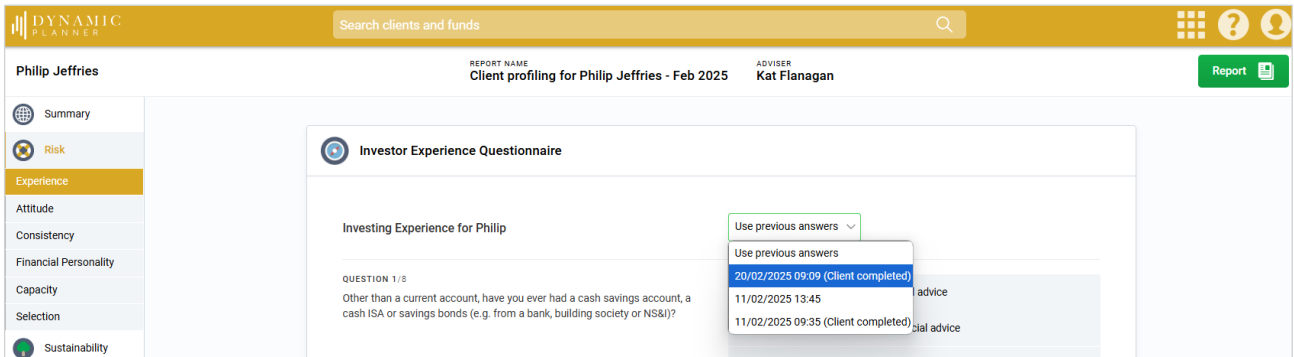
**Client profiling** [Close]

**Create new client profiling** | Recent client profiling activity

Client profiling name \*

Adviser \*

Navigate to the left hand menu and select the first questionnaire. In the **Use previous answers** drop down menu, select the answers highlighted with the **latest date stamp** and **Client completed in brackets**.



**Philip Jeffries** | REPORT NAME: Client profiling for Philip Jeffries - Feb 2025 | ADVISER: Kat Flanagan | Report

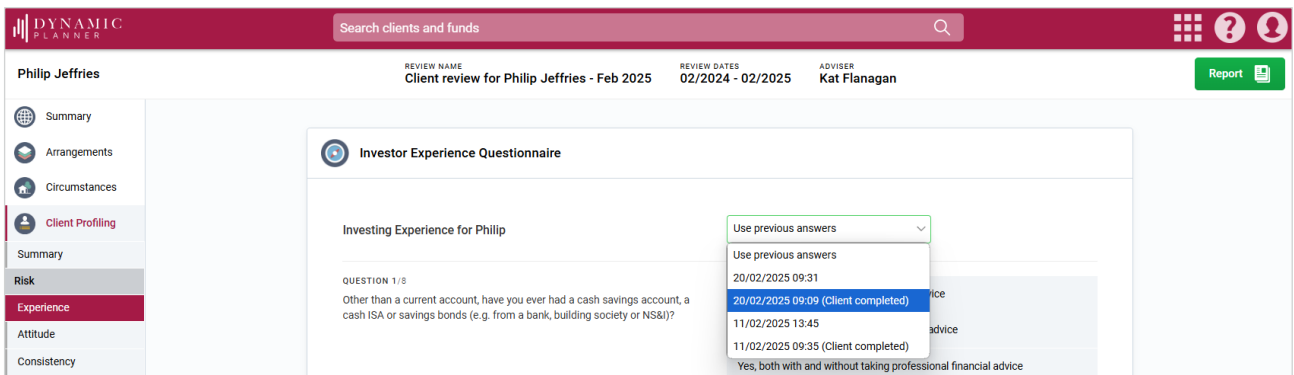
**Investor Experience Questionnaire**

Investing Experience for Philip

QUESTION 1/3  
 Other than a current account, have you ever had a cash savings account, a cash ISA or savings bonds (e.g. from a bank, building society or NS&I)?

Use previous answers dropdown menu:  
 Use previous answers  
 20/02/2025 09:09 (Client completed)  
 11/02/2025 13:45  
 11/02/2025 09:35 (Client completed)

Alternatively, if you are looking to review your client's portfolio, once you land on the **Client Dashboard**, select **Client Review**, then click **Create**. Navigate to the left hand menu, select the Client Profiling section and follow the steps outlined above to import the responses.



**Philip Jeffries** | REVIEW NAME: Client review for Philip Jeffries - Feb 2025 | REVIEW DATES: 02/2024 - 02/2025 | ADVISER: Kat Flanagan | Report

**Investor Experience Questionnaire**

Investing Experience for Philip

QUESTION 1/3  
 Other than a current account, have you ever had a cash savings account, a cash ISA or savings bonds (e.g. from a bank, building society or NS&I)?

Use previous answers dropdown menu:  
 Use previous answers  
 20/02/2025 09:31  
 20/02/2025 09:09 (Client completed)  
 11/02/2025 13:45  
 11/02/2025 09:35 (Client completed)  
 Yes, both with and without taking professional financial advice





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