



Risk Tolerance, Risk Profiling and the Financial Planning Process

Advisers generally accept their professional, ethical and legal obligation to form a view of their clients' risk tolerance and to take that view into account when giving advice. However there is no general agreement as to what risk tolerance is, how it should be assessed and how that assessment should be applied in the planning process.

What we know about risk tolerance has been compiled [here](#) to address these issues.



Investing Is All About Risk So Get Personal About It

This short American article gives a plain English perspective on risk tolerance and associated issues. We were particularly impressed by the phrasing of sometimes complex concepts and thought that advisers might find some inspiration for their own communication with clients from it. [Click for full article by Jennifer Woods.](#)



Market Education to Avoid an Attack of Buyer Remorse

We've all had buyer remorse at one time or another, whether it's for a \$10 purchase or a \$1 million purchase, the feeling is just as bad.

With the current market uncertainty, the best way to counter an attack of buyer remorse is by doing your homework. [Click for full article by Morris Kaplan.](#)



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