

Risk Profile Questionnaire Builder

Insurance

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds a client risk-profiling questionnaire — across assets, operations, people, liability, cyber and financial — that surfaces insurance needs, with scoring guidance. Use it to profile clients systematically. To turn answers into a proposal, use the Coverage Recommendation Report.

Purpose of this tool & output

Build a client risk-profiling form

How the output is used

Use the builder to create a client risk-profiling form that surfaces the right cover needs.

Important cautions

AI-generated form; adapt to client segment.

Companion documents

- Client Insurance Review Report
- Cross-Sell Opportunity Finder
- Coverage Recommendation Report
- Insurance Proposal Generator
- Client Renewal Advisory

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.