

# How do I create an Accumulation Goal?

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You have the ability to create **Accumulation Goals** for a client, this is for use within Modeller which is an Investment Planning and Risk Profiling tool.

For full details regarding Modeller please refer to the Synaptic Modeller User Guide.

The screen shots below show how to start the journey to create **Accumulation Goals**.

Once in the **Accumulation Goals** screen, click on the **Add** button to create a new **Goal** as shown below:

Goal Details				Investment Details			
Goal Name	Target	Type	Review Date	Term	Remaining	Attitude to Risk	Holdings
Client review	£27,000.00	Lump sum	14/11/2018	10 years			1 holding

The following screen will appear for completion, then click on **Next** to go through to the Modeller scenario:

[Clients](#) [Risk Rating](#) **Modeller** [Analyser](#) [Comparator](#) [Webline](#) [Product & Fund](#) [Tools & Calculators](#) [Settings](#) Example Test [Help](#)

[Example Test](#) **Goal Details** [Holdings](#) [Determine Risk Level](#) [Results](#) [Generate Report](#)

### Goal Details

Goal Type  Lump Sum  Income

Goal Name

Target Value £

Review Date

### Investment Details

You should add any holdings on the next page.

Term

Total Solution Cost % (Annually)

New Initial Contribution £

New Regular Contribution £

Contribution Frequency

Indexed

Investment Basis  Balanced  Non-balanced

Target Basis  Real  Nominal

<https://comparator.synaptic.co.uk/FusionUI/Comparator> | All rights reserved. | [Accessibility](#) Next

Once you have completed your scenario, you can find all **Accumulation Goals** within the screen below:

[Clients](#) [Risk Rating](#) **Modeller** [Analyser](#) [Comparator](#) [Webline](#) [Product & Fund](#) [Tools & Calculators](#) [Settings](#) Example Test [Help](#)

[Example Test](#)

- [Personal Details](#)
- [Holdings](#)
- [Income Sources](#)
- [Accumulation Goals](#)
- [Retirement Income Goals](#)

Goal Details				Investment Details				Add
Goal Name	Target	Type	Review Date	Term	Remaining	Attitude to Risk	Holdings	
Client review	£27,000.00	Lump sum	14/11/2018	10 years			1 holding	<a href="#">i</a> <a href="#">x</a>