Application Tabs

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There are 9 tabs at the top of the screen that you can choose from:

Clients - where you can add or retrieve client details.

Risk rating - Risk rated funds and portfolios

Modeller - an investment planning and risk profiling tool.

Analyser - Income drawdown analysis tool & product comparison

Comparator - a quantitative and qualitative on and off platform cost comparison tool. Also includes pension switch analysis.

Webline - for researching quotations and applying for Protection, Annuities or Health policies.

Product & Fund – for conducting qualitative Product or Fund research.

Tools & Calculators - Modeller, Analyser & Comparator calculators

Settings – to access Fund Management, Administration and Enterprise Messaging Platform.

The type of licence purchased will drive which of the Synaptic tools you have access to. Modeller, Analyser and Comparator will not need further sign in credentials but in order to access Product & Fund and Webline you need to ensure that your 'sign in' credentials are set before initial use.