

Risk Rated Holdings within Modeller

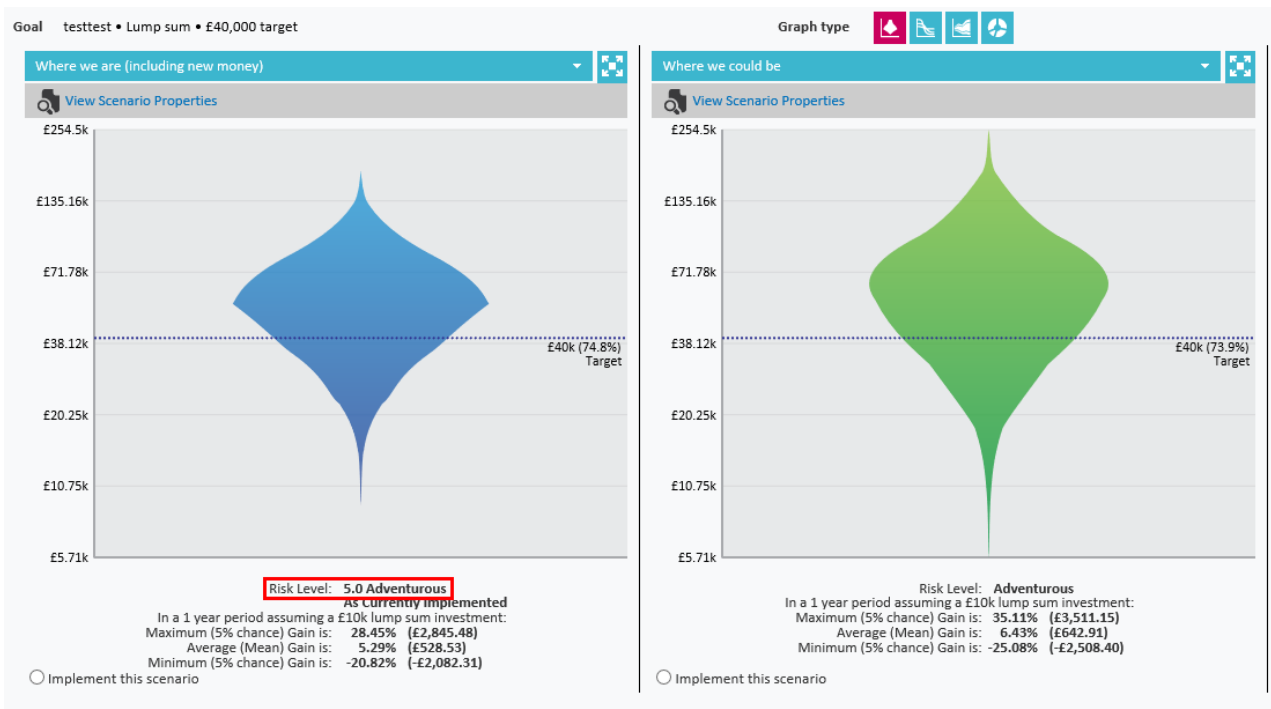
Last Modified on 14/04/2020 12:15 pm BST

Once your holdings have been risk rated, you are able to view this information within the Modeller journey.

When adding the holdings to the goal, you can see the risk rating against each holding:

Holding	Type	Details	Synaptic Risk Rating	Value
<input type="checkbox"/> Aviva Pension	Plan	Aviva Life & Pensions UK Limited - Pe...	Adventurous Plus (Rated on 19 March 2020 at 14:11)	£128,865.00
<input type="checkbox"/> Friends Life Personal Pension	Plan	Friends Life - The Personal Range - In...	5.0 Adventurous (Rated on 19 March 2020 at 14:11)	£37,570.00

Once you have completed the 10k screen, you are able to see the risk rating under the 'Where we are' graph within the probability graph area. This allows you to easily compare where your clients current holdings are against 'Where we could be' in the second graph:



Once the Modeller scenario is completed, you are able to see the risk rating within the report:



Plan Details

Name: Friends Life Personal Pension	Start Date: 12/08/2008
Provider: Friends Life	End Date: -
Product: The Personal Range - Individual Personal Pension	Current Value: £37,570.00
Status: In Force	Contract Number: JKU88035
Synaptic Risk Rating: 5.0 Adventurous	