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:

| | | | | | Wood - ? Help |
|-------------------------------|---------------|--|--|---|--|
| Add Holdings | | | | | |
| Holding | Туре | Details | Synaptic Risk Rating | Value | |
| Aviva Pension | Plan | Aviva Life & Pensions UK Limited - Pe | Adventurous Plus (Rated on 19 March 2020 at 14:11) | £128,865.00 | Add 🕂 |
| 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 | |
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| | Aviva Pension | Add Holdings Holding Type Aviva Pension Plan | Add Holdings Holding Type Details Aviva Pension Plan Aviva Life & Pensions UK Limited - Pe | Add Holdings Type Details Synaptic Risk Rating In Aviva Pension Plan Aviva Life & Pensions UK Limited - Penalist (Rated on 19 March 2020 at 14:11) Adventurous Plus (Rated on 19 March 2020 at 14:11) | Add Holdings Type Details Synaptic Risk Rating Value In Aviva Pension Plan Aviva Life & Pensions UK Limited - Pe Adventurous Plus (Rated on 19 March 2020 at 14:11) £128,865.00 In Aviva Life & Pensions UK Limited - Pe S.0 Adventurous £0.4 Adventurous £127,270.00 |

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:

| SYNAPTIC SOFTWARE | | Synaptic Plan 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 | | |