

How do I include inflation in an Illustration?

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Inflation can be viewed under the Results + Inflation or the Results + Costs & Inflation tabs:

To apply Inflation to the research, click into the Advanced Options tab of an illustration.

You can either enable the impact of inflation to change the details of the original Illustration, or leave inflation disabled in the Illustration Settings and use the Alternative Outcomes to compare with inflation.

Enabling 'Allow for the Impact of Inflation' within the Illustration Settings, will include inflation in the Illustration.

Result Result + Costs Result + Inflation Result + Costs & Inflation Suitability Compliance Details Report Content **Advanced Options**

Illustration Settings

Investment Details

*Term of Investment in Years: 10

*Initial Amount £: £200,000

Frequency of Contribution: Monthly

*Regular Amount £: £200

Indexation Rate for Contribution: None

Indexation Rate %: 0.00%

Rebalance Annually: Active

Allow for the Impact of Inflation: Inactive

Capacity for Loss Statement
My Client can afford to lose **12.32%** in any one year, as a worst case scenario this could equate to **£49,509.15** loss in the final year of the **10 Year** term proposed

Chart: Efficient Frontier Portfolio Probability

Target:

Legend: Forecast Mean Return, Forecast Min. Return, Forecast Max. Return, Net Money In Contributions, Withdrawals

You will need to click 'Update' for the changes to take effect.

Use the option on this page to modify the parameters for the illustration and toggle the values you want to review on the graph

Update
Revert

This will change the Quick Toggle within 'Alternative Outcome' area to add 'Without Inflation' as an alternative Outcome.

Result Result + Costs Result + Inflation Result + Costs & Inflation Suitability Compliance Details Report Content **Advanced Options**

Illustration Settings

Investment Details

*Term of Investment in Years: 10

*Initial Amount £: £200,000

Frequency of Contribution: Monthly

*Regular Amount £: £200

Indexation Rate for Contribution: None

Indexation Rate %: 0.00%

Rebalance Annually: Active

Allow for the Impact of Inflation: Active

Capacity for Loss Statement
My Client can afford to lose **12.32%** in any one year, as a worst case scenario this could equate to **£36,926.00** loss in the final year of the **10 Year** term proposed

Chart: Efficient Frontier Portfolio Probability

Target:

Legend: Forecast Mean Return, Forecast Min. Return, Forecast Max. Return, Net Money In Contributions, Withdrawals

Compare Alternate Outcomes

Quick Toggles: **Without Inflation** No Fees

Advanced Options: What if Drawdown Solve

Term Matrix: Explore the impact of term and risk using the target illustration as the reference.

Select an alternative Term: None

Select an alternative Risk Category: None

Sustainable Drawdown: Annuity Basis for Income Disabled

*Retirement Age (Default 65): 65

If you would prefer to leave your Illustration without Inflation and would like to see how adding Inflation to the charts compare, leave Inflation disabled in the Illustration settings and click 'With Inflation' in the Alternative Outcome area:

Compare Alternate Outcomes

Quick Toggles

With Inflation

No Fees

Advanced Options

What If

Drawdown

Solve

Term Matrix

Explore the impact of term and risk using the target illustration as the reference.

Select an alternative Term

None

Select an alternative Risk Category

None

Result
Result + Costs
Result + Inflation
Result + Costs & Inflation
Suitability
Compliance Details
Report Content
Advanced Options

Illustration Settings

Investment Details

* Term of Investment in Years
10

* Initial Amount £
£200,000

Frequency of Contribution
Monthly

* Regular Amount £
£200

Indexation Rate for Contribution
None

Indexation Rate %
0.00%

Rebalance Annually Active

Allow for the Impact of Inflation Inactive

Capacity for Loss Statement
My Client can afford to lose **12.32%** in any one year, as a worst case scenario this could equate to **£49,509.15** loss in the final year of the **10 Year** term proposed

Yes No

Chart
Efficient Frontier
Portfolio
Probability

Target

Year	Forecast Mean Return	Forecast Min. Return	Forecast Max. Return	With Inflation Mean Return	With Inflation Min. Return	With Inflation Max. Return
1	£225k	£175k	£275k	£205k	£155k	£255k
2	£230k	£178k	£280k	£210k	£158k	£260k
3	£235k	£181k	£285k	£215k	£161k	£265k
4	£240k	£184k	£290k	£220k	£164k	£270k
5	£245k	£187k	£295k	£225k	£167k	£275k
6	£250k	£190k	£300k	£230k	£170k	£280k
7	£255k	£193k	£305k	£235k	£173k	£285k
8	£260k	£196k	£310k	£240k	£176k	£290k
9	£265k	£199k	£315k	£245k	£179k	£295k
10	£270k	£202k	£320k	£250k	£182k	£300k

Compare Alternate Outcomes

Quick Toggles

With Inflation

No Fees

Advanced Options

What If

Drawdown

Solve

Term Matrix

Explore the impact of term and risk using the target illustration as the reference.

Select an alternative Term

None

Select an alternative Risk Category

None

Sustainable Drawdown

Annuity Basis for Income Disabled

* Retirement Age (Default 65)

65