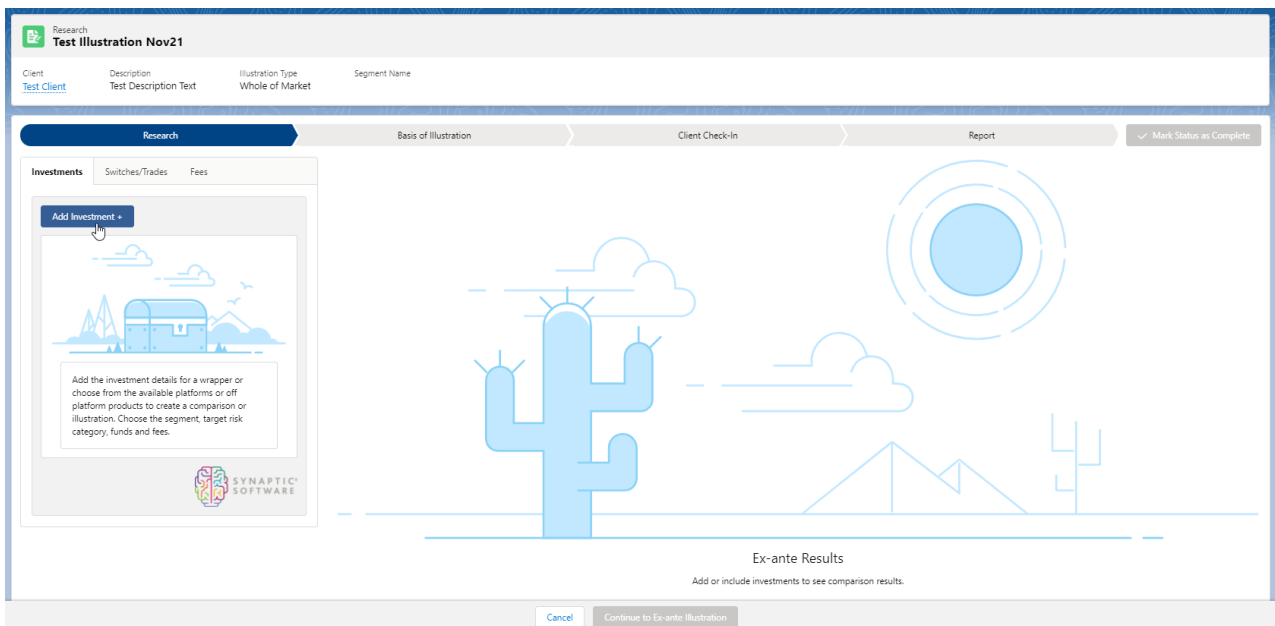


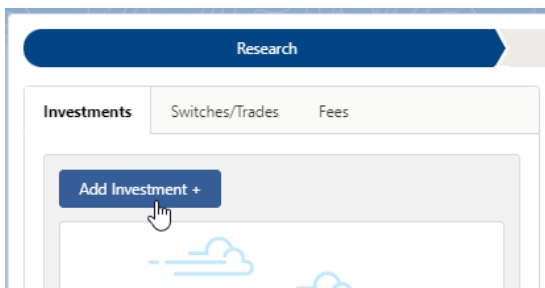
Comparison & Ex-Ante - Add Investment

Last Modified on 06/10/2022 4:22 pm BST

Once the Research has been created, you can start to add Investments to research. See articles on how to create research -[Comparison & Ex-Ante - Creating through the homepage](#) [Comparison & Ex-Ante - Creating in the research tab](#) & [Comparison & Ex-Ante - Creating within a client record](#).



Add investment through the **Add Investment +** button:



An Adviser Fee box will appear:

Adviser Fees

If you are going to add multiple investment wrappers to the comparison illustration and you would like to specify the Adviser Fees per Investment Wrapper then please enable the toggle before selecting continue, otherwise you can optionally add the fees below now or update later in the fees tab on the research step

Add Fees Per Wrapper Inactive

Adviser Fees
Adviser fees are pre-populated from the chosen segment if present. You can change or add fees below.

Initial Fee: % £

Regular Annual Fee: % £

One off Fee for Advice: % £ Restore Fees

Fee on Regular Contribution: % £

Over How Many Contributions:

Cancel Continue

If you are going to add multiple investments to the comparison, you can either specify you would like to set fees by individual investment or by research.

Add Fees Per Wrapper will allow you to enter the adviser fees against the individual investment.

Adviser Fees

If you are going to add multiple investment wrappers to the comparison illustration and you would like to specify the Adviser Fees per Investment Wrapper then please enable the toggle before selecting continue, otherwise you can optionally add the fees below now or update later in the fees tab on the research step

Add Fees Per Wrapper Active

Cancel Continue

If you would like to apply the fees to the research, enter the details below and **Continue**.

Note: Fees can be updated in the Fees tab in the research.

Adviser Fees

If you are going to add multiple investment wrappers to the comparison illustration and you would like to specify the Adviser Fees per Investment Wrapper then please enable the toggle before selecting continue, otherwise you can optionally add the fees below now or update later in the fees tab on the research step

Add Fees Per Wrapper Inactive

Adviser Fees
Adviser fees are pre-populated from the chosen segment if present. You can change or add fees below.

Initial Fee: % £

Regular Annual Fee: % £

One off Fee for Advice: % £ Restore Fees

Fee on Regular Contribution: % £

Over How Many Contributions:

Cancel Continue

For this example, we will add the fees per individual investment.

Adviser Fees

If you are going to add multiple investment wrappers to the comparison illustration and you would like to specify the Adviser Fees per Investment Wrapper then please enable the toggle before selecting continue, otherwise you can optionally add the fees below now or update later in the fees tab on the research step

Add Fees Per Wrapper Active

Choose Wrapper Type & Investment Details

Investment Segment, Wrapper & Risk Category
Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type <input type="text" value="Select an Option"/>	* Choose Target Risk Category <input type="text" value="Select an Option"/>
* Objectives & Needs <input type="text" value="Select an Option"/>	* Ability to Bear Losses <input type="text" value="Select an Option"/>

Complete the **Wrapper Type**, **Target Risk Category**, **Objective & Needs** and **Ability to Bear Losses**:

Investment Segment, Wrapper & Risk Category
Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type <input type="text" value="Select an Option"/>	* Choose Target Risk Category <input type="text" value="Select an Option"/>
* Objectives & Needs <input type="text" value="Select an Option"/>	* Ability to Bear Losses <input type="text" value="Select an Option"/>

- Investment Bond
- Offshore Bonds
- Individual Savings Accounts
- Income Drawdown
- General Investment Account
- Pensions

Investment Segment, Wrapper & Risk Category

Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type

Pensions

* Choose Target Risk Category

Select an Option

* Objectives & Needs

Select an Option

- 1 - Cautious
- 2 - Moderately Cautious
- 3 - Balanced
- 4 - Moderately Adventurous
- 5 - Adventurous

Investment Segment, Wrapper & Risk Category

Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type

Pensions

* Choose Target Risk Category

3 - Balanced

* Objectives & Needs

Select an Option

* Ability to Bear Losses

Select an Option

- Preservation
- Growth
- Income
- Hedged
- Leveraged Return

Investment Segment, Wrapper & Risk Category

Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type

Pensions

* Choose Target Risk Category

3 - Balanced

* Objectives & Needs

Growth

* Ability to Bear Losses

Select an Option

- Limited Capital Loss
- No Capital Guarantee
- Loss Beyond Capital

Once all fields have been completed, further detail will appear below:

Choose Wrapper Type & Investment Details

Investment Segment, Wrapper & Risk Category

Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type

Pensions

* Choose Target Risk Category

3 - Balanced

* Objectives & Needs

Growth

* Ability to Bear Losses

No Capital Guarantee

Adviser Fees

Adviser fees are pre-populated from the chosen segment if present. You can change or add fees below.

Initial Fee

% £ £0

Regular Annual Fee

% £ £0

One off Fee for Advice

% £ £0

Restore Fees

Fee on Regular Contribution

% £ £0

Over How Many Contributions

0

Investment Details

Objective / Goal description

Add a description of the objective...

* Initial Amount £

Transfer In Amount £

Contributions

Regular Contribution £

Frequency of Contribution

Monthly

Indexation Rate for Contribution

None

Indexation Rate %

0.00%

Withdrawals

Regular Withdrawal £

Frequency of Withdrawal

Monthly

Indexation Rate for Withdrawal

None

Indexation Rate %

0.00%

Cancel

Save

Complete the **Adviser Fees** area:

Note: Fees will be pre-populated if using a segment. If any changes are made, **Restore Fees** will revert the values back to what has been set in the segment. If completing whole of market research, the **Restore Fees** button will be greyed out.

Adviser Fees

Adviser fees are pre-populated from the chosen segment if present. You can change or add fees below.

Initial Fee

% £ 0.40%

Regular Annual Fee

% £ 0.60%

One off Fee for Advice

% £ £200

Restore Fees

Fee on Regular Contribution

% £ £100

Over How Many Contributions

10

Enter the **Investment Details**.

Investment Details

Objective / Goal description

*Initial Amount £ Transfer In Amount £

Contributions

Regular Contribution £ Frequency of Contribution Indexation Rate for Contribution Indexation Rate %

Withdrawals

Regular Withdrawal £ Frequency of Withdrawal Indexation Rate for Withdrawal Indexation Rate %

Summary

Total Initial + Transfer	Total of Contributions	Total of Withdrawals	Net Investment Over Term
£400,263.00	£42,732.69	-£8,902.64	£434,093.05

Once entered, a summary will be calculated:

Summary

Total Initial + Transfer	Total of Contributions	Total of Withdrawals	Net Investment Over Term
£400,263.00	£42,732.69	-£8,902.64	£434,093.05

Select the **Portfolio** or **Fund** in the **Fund Selection** area:

Fund Selection
 Select a portfolio or an individual fund as the basis of the investment.

Search by

All

Choose either **Portfolio** or **Fund**

Search by

All

If Portfolio is selected, you are able to select the type of portfolio in the **All** drop down:

Fund Selection
 Select a portfolio or an individual fund as the basis of the investment.

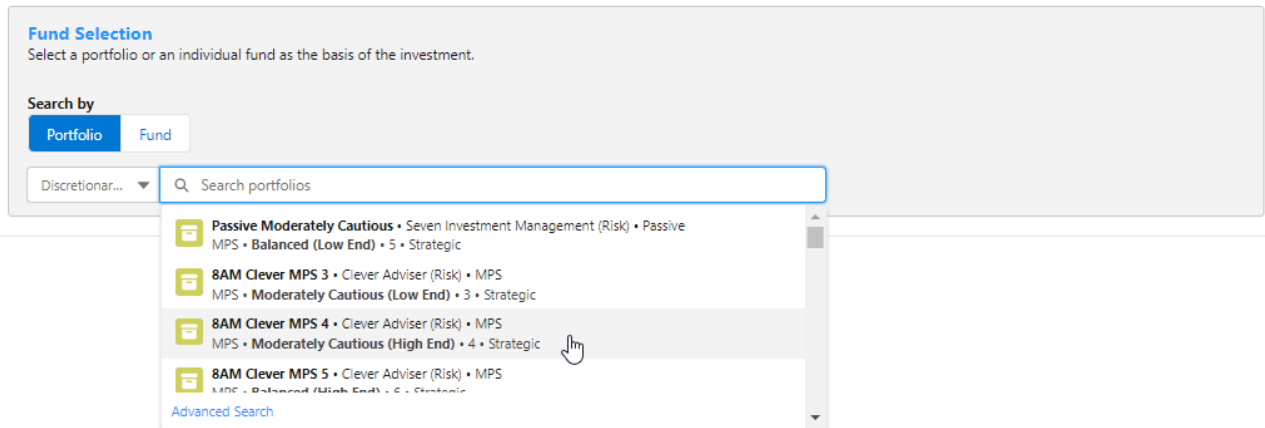
Search by

All

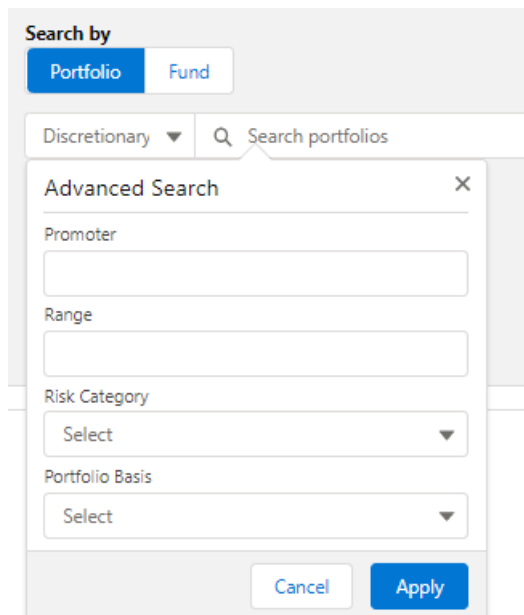
- ✓ All
- In-House Discretionary ...
- Bespoke Portfolio
- Discretionary Fund Man...
- Insurance Distribution D...
- Model Portfolio
- Multi-Asset

In this example, we have selected **Discretionary Fund Managers**.

When searching, only Portfolios offered by Discretionary Fund Managers will be returned:



Advanced Search allows you narrow the search by **Promoter, Range, Risk Category & Portfolio Basis**:



If **Risk Category** is set, this will return DFM portfolios with a risk rating of **Moderately Cautious (High End)**.

Click **Apply**:

Fund Selection

Select a portfolio of funds or an individual fund as the basis of the investment.

Search by

Portfolio Fund

Discretionary

Advanced Search

Promoter

Range

Risk Category

Moderately Cautious (High End)

Portfolio Basis

Select

Cancel

Apply

Fund Selection

Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio Fund

Discretionar...

- 8AM Clever MPS 4 • Clever Adviser (Risk) • MPS
MPS • Moderately Cautious (High End) • 4 • Strategic
- AJ Bell Active MPS 1 • AJ Bell (Risk) • Active
MPS • Moderately Cautious (High End) • 4 • Strategic
- AJ Bell Pactive MPS 1 • AJ Bell (Risk) • Pactive
MPS • Moderately Cautious (High End) • 4 • Strategic
- AJ Bell Passive MPS 1 • AJ Bell (Risk) • Passive
MPS • Moderately Cautious (High End) • 4 • Strategic

Advanced Search

Fund Selection

Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio Fund

MPS • Moderately Cautious (High End) • 4 • Strategic

If selecting a fund, click **Fund**:

Fund Selection

Select a portfolio of funds or an indivi

Search by

Portfolio Fund

Search for funds using the fund name or fund code:

Fund Selection

Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio

Fund

Q Daz7



Royal London UK All Share Tracker Z Acc
GB00B533V415 • DAZ7 • Royal London Unit Tst Mgrs



Fund Selection

Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio

Fund



Royal London UK All Share Tracker Z Acc
GB00B533V415 • DAZ7 • Royal London Unit Tst Mgrs



Click **Save:**

Choose Wrapper Type & Investment Details

Investment Details

Objective / Goal description

Test Goal Description Text

* Initial Amount £

£200,000

Transfer In Amount £

Contributions

Regular Contribution £

£200

Frequency of Contribution

Monthly

Indexation Rate for Contribution

Retail Price Index (RPI) 8.2%

Indexation Rate %

8.20%

Withdrawals

Regular Withdrawal £

£500

Frequency of Withdrawal

Annually

Indexation Rate for Withdrawal

Retail Price Index (RPI) 8.2%

Indexation Rate %

8.20%

Summary

Total Initial + Transfer

£200,000.00

Total of Contributions

£35,099.70

Total of Withdrawals

-£7,312.44

Net Investment Over Term

£227,787.27

Fund Selection

Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio

Fund



Royal London UK All Share Tracker Z Acc
GB00B533V415 • DAZ7 • Royal London Unit Tst Mgrs



Cancel

Save