

Comparison & Ex-Ante - Editing Investment Details

Last Modified on 26/05/2022 10:20 am BST

Edit wrapper Investment details through the **Edit** button:

The screenshot shows a user interface for managing investments. At the top, there is a blue 'Research' button. Below it are tabs for 'Investments', 'Switches/Trades', and 'Fees'. An 'Add Investment +' button is visible. Two investment cards are displayed:

- Individual Savings Accounts**: Investment Amount £28,000.00, Risk Category Moderately Cautio..., Target Fund Royal London UK All Share Tracker Z Acc. An 'Edit' button is highlighted with a mouse cursor.
- Self Invested Personal Pension**: Investment Amount £223,786.75, Risk Category Moderately Cautio..., Target Fund Royal London UK All Share Tracker Z Acc. An 'Edit' button is also present.

Each card includes a trash icon and a checkmark icon.

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: Individual Savings Accounts
* Choose Target Risk Category: 4 - Moderately Cautious (High End)
* Objectives & Needs: Growth
* Ability to Bear Losses: No Capital Guarantee

Investment Details

Objective / Goal description: Test ISA Objective Description

* Initial Amount £: £10,000
Transfer In Amount £: £0

Contributions

Regular Contribution £: £150
Frequency of Contribution: Monthly
Indexation Rate for Contribution: None
Indexation Rate %: 0.00%

Withdrawals

Regular Withdrawal £: £0
Frequency of Withdrawal: Monthly
Indexation Rate for Withdrawal: None
Indexation Rate %: 0.00%

Summary

Total Initial Amount	Total of Contributions	Total of Withdrawals	Net Investment Over Term
£10,000.00	£18,000.00	-	£28,000.00

Fund Selection

Cancel Save

Make changes and **Save**

Investment Details

Objective / Goal description: Test ISA Objective Description

* Initial Amount £: 15000
Transfer In Amount £: £0

Contributions

Regular Contribution £: £150
Frequency of Contribution: Monthly
Indexation Rate for Contribution: None
Indexation Rate %: 0.00%

Withdrawals

Regular Withdrawal £: £0
Frequency of Withdrawal: Monthly
Indexation Rate for Withdrawal: None
Indexation Rate %: 0.00%



Summary


Total Initial Amount	Total of Contributions	Total of Withdrawals	Net Investment Over Term
£15,000.00	£18,000.00	-	£33,000.00







Fund Selection



Cancel Save

Once saved, the results will recalculate:

 **Success**
Investment wrapper record is successfully updated 

 Synaptic Pathways Home Contacts Research Portfolio Builder Investment Pathways Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Search: _____      

Research  **Success**
Investment wrapper record is successfully created  [Convert to Holding](#)

Client: [Client Test](#) Description: Test Description Text Illustration Type: Whole of Market Segment Name:

Research Review Client Check-in Report [Mark Status as Complete](#)

Investments Switches/Trades Fees

[Add Investment](#)

Self Invested Personal Pension [Edit](#)

Investment Amount: £227,787.27 Risk Category: Moderately Cautio...
Target Fund: Royal London UK All Share Tracker Z Acc

Individual Savings Accounts [Edit](#)

Investment Amount: £45,712.24 Risk Category: Moderately Cautio...
Target Fund: Royal London UK All Share Tracker Z Acc


Term: 10 [Update Results](#)


[Change Segment](#) [Stakeholder Pension](#) [Exclude Adviser Fees](#) [3 Significant Figures](#) [Report](#)

Filter Results by Provider: Filter one or more providers

Filter Results by Product: Filter one or more products

Sort Results by Value: Growth % Final Value £ Charges £ RLY %





[Cancel](#) [Continue to Ex-ante Illustration](#)