

Comparison & Ex-Ante using a CIP - Switches/Trades

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Add switching information through the **Switches/Trades** tab.

The screenshot shows the 'Test Illustration CIP' interface. At the top, there are tabs for 'Research', 'Review', 'Client Check-In', and 'Report'. Below these, there are sections for 'Investments', 'Switches/Trades', and 'Fees'. The 'Switches/Trades' tab is active, showing a list of investment platforms with columns for Growth, Final Value, Total Fees, and R.I.Y. A 'Set Trades +' button is visible at the bottom of the interface.

The 'Switches/Trades' tab form contains the following fields and options:

- + Add Trades (Optional)**: Provide a number of trades, the frequency and percentage of the value balance to trade.
- Trades (Buy/Sell)**: Input field with value 0.
- Frequency of Trades**: Dropdown menu with value Monthly.
- % of Current Balance to Trade**: Input field with value 0.00%.
- Value Balance**: Value Balance is determined during the R.I.Y calculation when the trade is applied.
- Set Trades +**: Button to apply the settings.

The **Set Trades +** button will become available once information is complete. **Set Trades +** to apply to the Results:

Investments **Switches/Trades** Fees

[+ Add Trades \(Optional\)](#)
Provide a number of trades, the frequency and percentage of the value balance to trade.

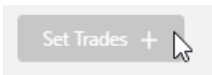
Trades (Buy/Sell)

Frequency of Trades

% of Current Balance to Trade

Value Balance is determined during the R.I.Y calculation when the trade is applied.

The button will be greyed out once applied.



Any changes to the information will make the button available again.
