

Basis of Illustration - Report Content - CIP

Last Modified on 26/05/2022 11:34 am BST

Report Content contains a **Recommendation Summary** and **Target Portfolio Summary**. When completed, they will appear on the report.

The **Outcome Summary** will display **Total Invested During Term**, **Expected Outcome (Stochastic)**, **Final Value (calculated)** & **Overall R.I.Y**

Outcome Summary

Total Invested During Term
£45,712.24

Expected Outcome (Stochastic)
£59,672.13 or 65.41% Growth

Final Value (Calculated)
£61,734.86 or 35.05% Growth

Overall R.I.Y.
0.46%

Objective Summary will pull through from the text entered in the Research>Add Investment screen.

Objective Summary

Test ISA Objective Description

Report Content is the last tab to review.

Check the box next to the Investment to mark as reviewed:

Review

Select a wrapper to review the results, complete the capacity for loss statement and add commentary for compliance and reporting.

Mark as reviewed by selecting the checkbox for each item.

7IM

Platform
7IM Platform

Individual Savings Accounts

Product
ISA (Stocks and Shares)

R.I.Y. 0.46%	Final Value £61,734.86
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Self Invested Personal Pension

Product
7IM SIPP

R.I.Y. 0.06%	Final Value £359,942.28
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Test Illustration Apr22 Convert to Holding

Research Review Client Check-in Report Mark Status as Complete

Review

Select a wrapper to review the results, complete the capacity for loss statement and add commentary for compliance and reporting.

Mark as reviewed by selecting the checkbox for each item.

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A special deal is available and has been applied.

Recommendation Summary

Salesforce Sans 12 B I U S

Target Portfolio Summary

Salesforce Sans 12 B I U S

Outcome Summary

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Objective Summary

Test ISA Description

Back Continue to Check-in

See article [Basis of Illustration - Mark Wrapper as Reviewed - CIP](#)
