

# Basis of Illustration - Mark Wrapper as Reviewed - CIP

Last Modified on 26/05/2022 11:35 am BST

Once all tabs have been reviewed and the Capacity for Loss statement has been completed, you can check the box next to the Investment:

**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.	Final Value
0.46%	£61,734.86

**Self Invested Personal Pension**

Product  
**7IM SIPP**

R.I.Y.	Final Value
0.06%	£359,942.28

**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**

**Individual Savings Accounts**  
Product: ISA (Stocks and Shares)  
R.I.Y. 0.46% Final Value £61,734.86

**Self Invested Personal Pension**  
Product: 7IM SIPP  
R.I.Y. 0.06% Final Value £359,942.28

**Recommendation Summary**  
Salesforce Sans 12

**Target Portfolio Summary**  
Salesforce Sans 12

**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**  
Test ISA Description

Back Continue to Check-In

If this is the only investment, you can proceed to the Check-In stage.

If you have multiple investments, you will need to review each investment separately:

**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.

**JAMES HAY Platform James Hay Modular iPlan**

**Individual Savings Accounts**  
Product: Modular Stocks & Shares ISA  
R.I.Y. 2.28% Final Value £33,758.50

**Self Invested Personal Pension**  
Product: Modular ISIPP  
R.I.Y. 1.37% Final Value £314,757.92

**Recommendation Summary**  
Salesforce Sans 12

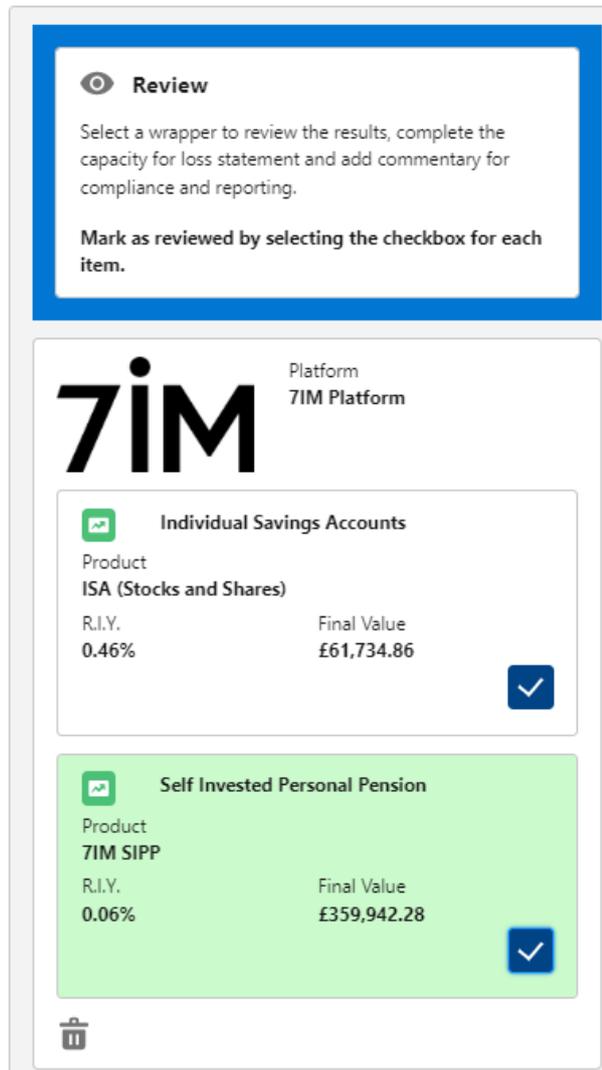
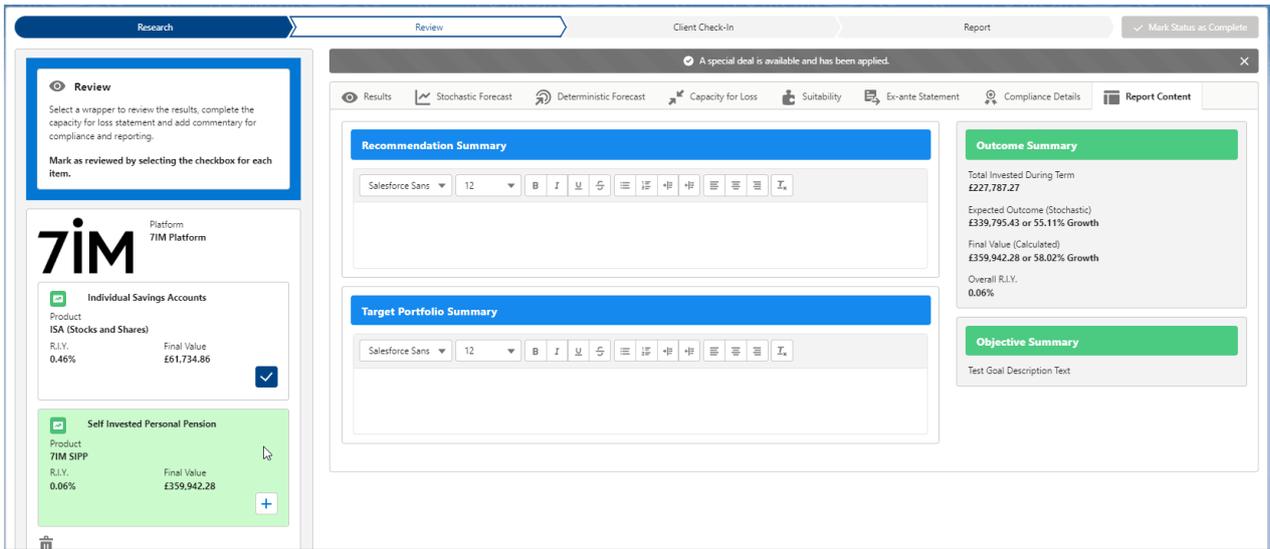
**Target Portfolio Summary**  
Salesforce Sans 12

**Outcome Summary**  
Total Invested During Term £28,000.00  
Expected Outcome (Stochastic) £31,737.82 or 13.35% Growth  
Final Value (Calculated) £33,758.50 or 20.57% Growth  
Overall R.I.Y. 2.28%

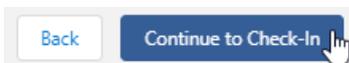
**Objective Summary**  
Test ISA Objective Description

Back Continue to Check-In

Repeat the review process, completing the Capacity for Loss statement before marking as reviewed.



All investments have been reviewed, proceed to the **Check-in** screen.



See article [Client Check-in](#)