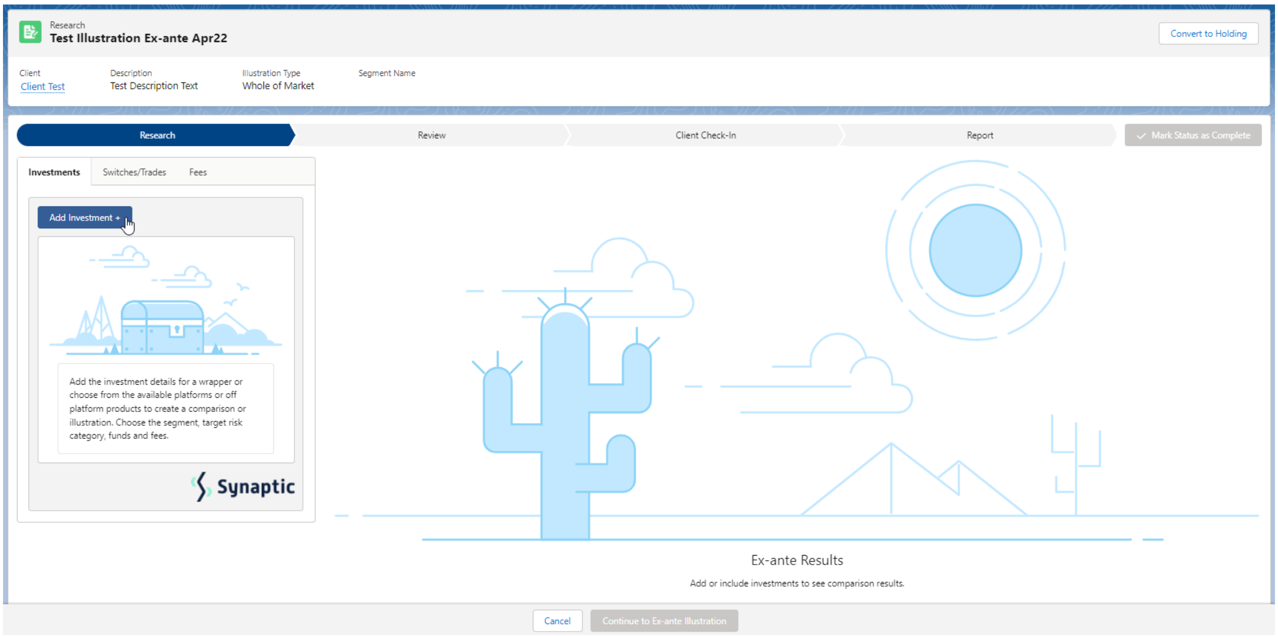
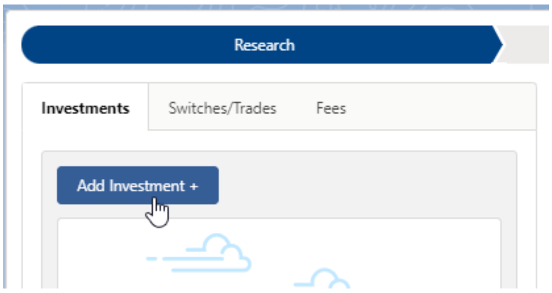
Ex-Ante - Add Investment

Last Modified on 06/10/2022 4:29 pm BST

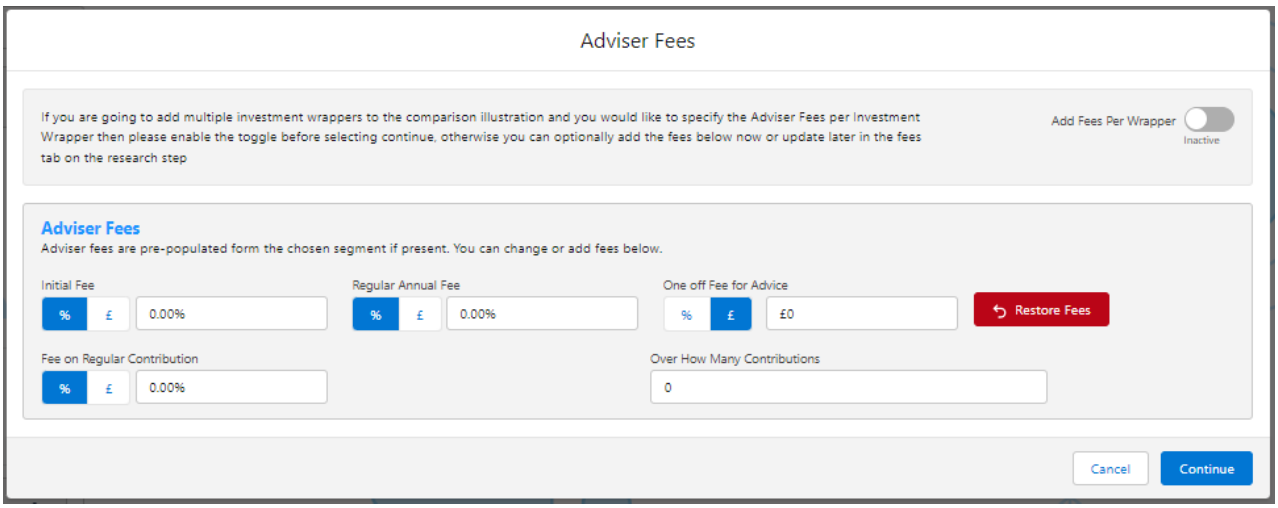
Once the Research has been created, you can start to add Investments to Research. See articles on how to create Research - Ex-Ante - Creating through the homepage, Ex-Ante - Creating in the Research tab or Ex-Ante - Creating research within a client record



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

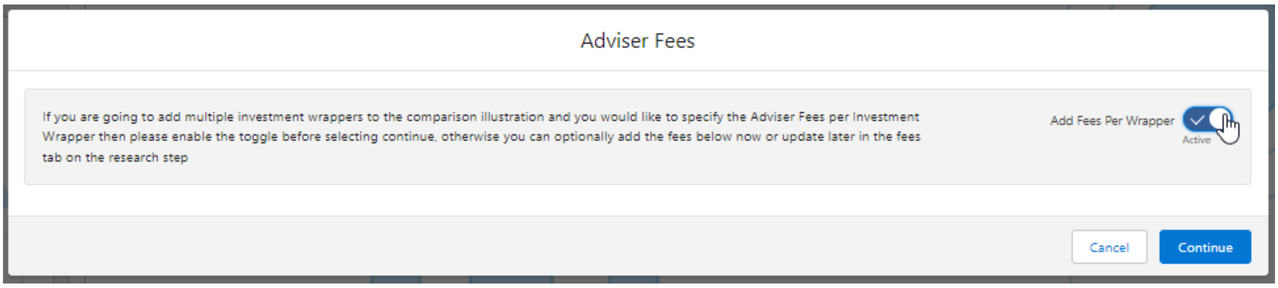


An Adviser Fees box will appear:



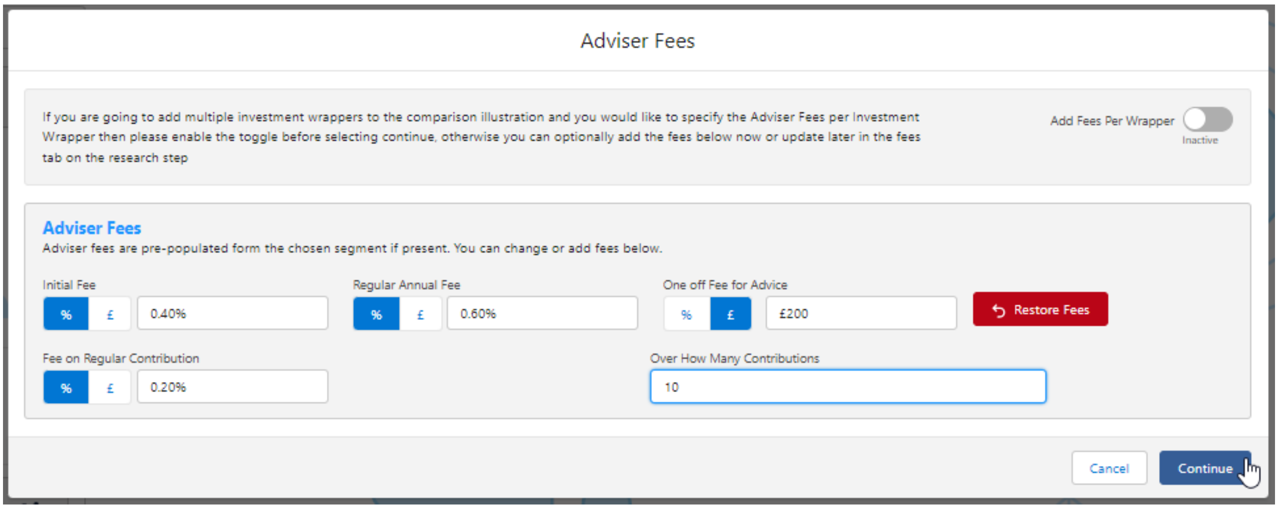
If you are going to add multiple investments to the comparison, you can either specify you would like to set fees by individual investment or by research.

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

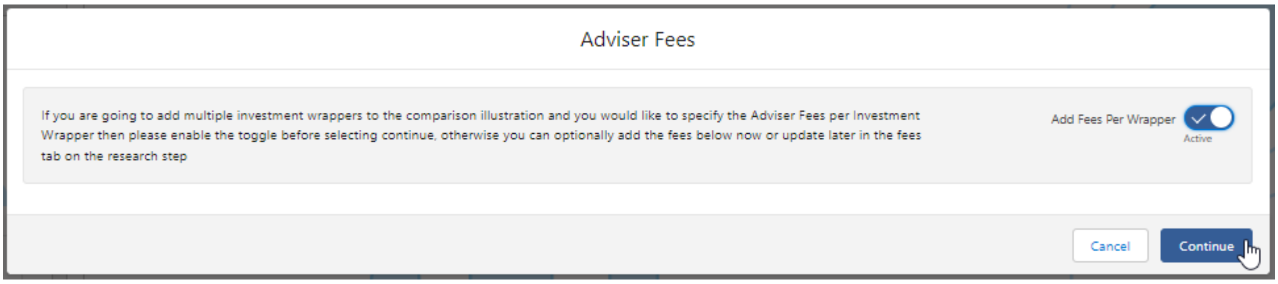


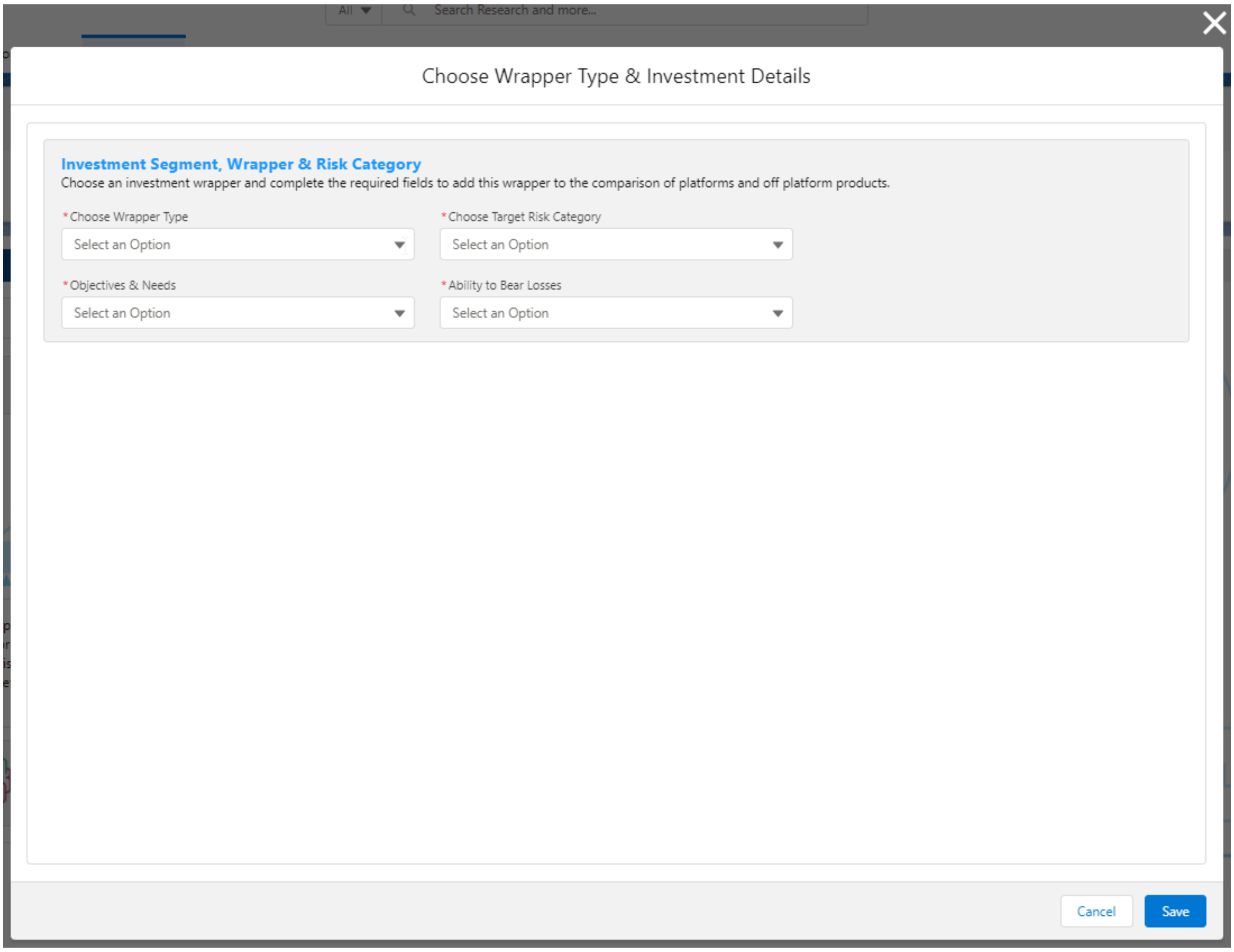
If you would like to apply the fees to the research, enter the details below and **Continue.**

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

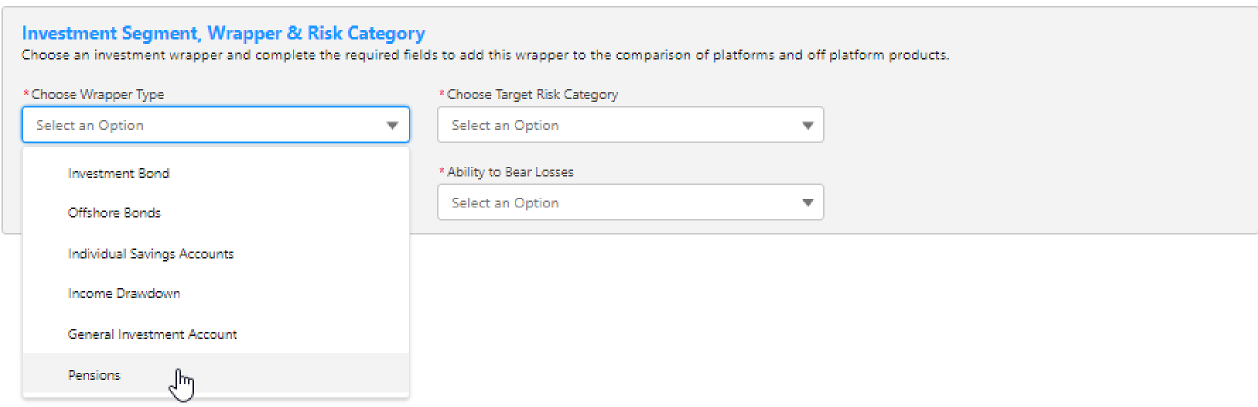


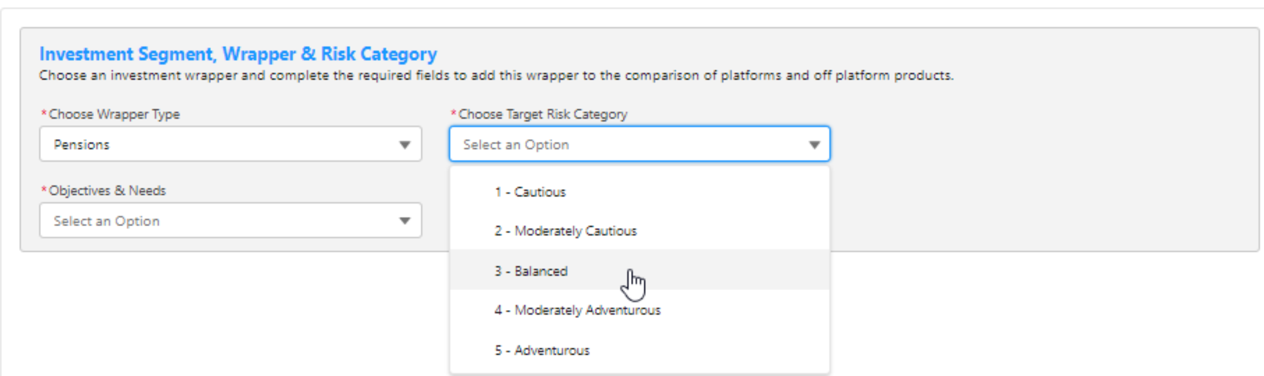
For this example, we will add the fees per individual investment.

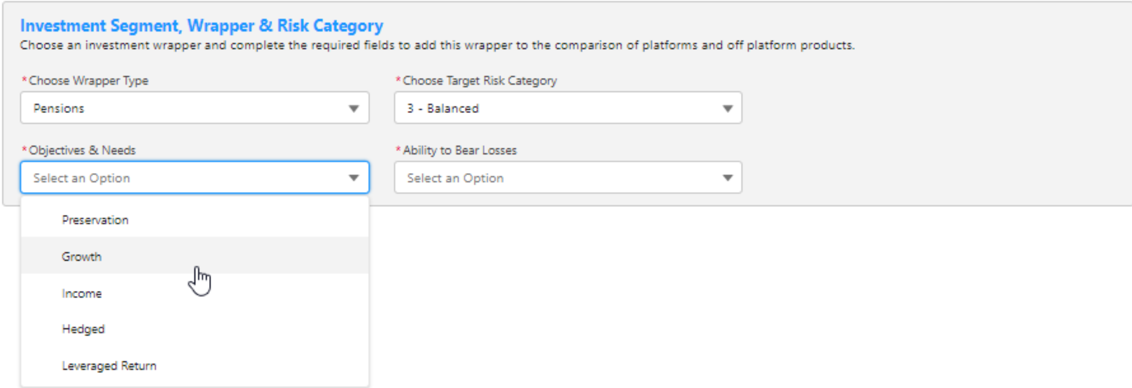


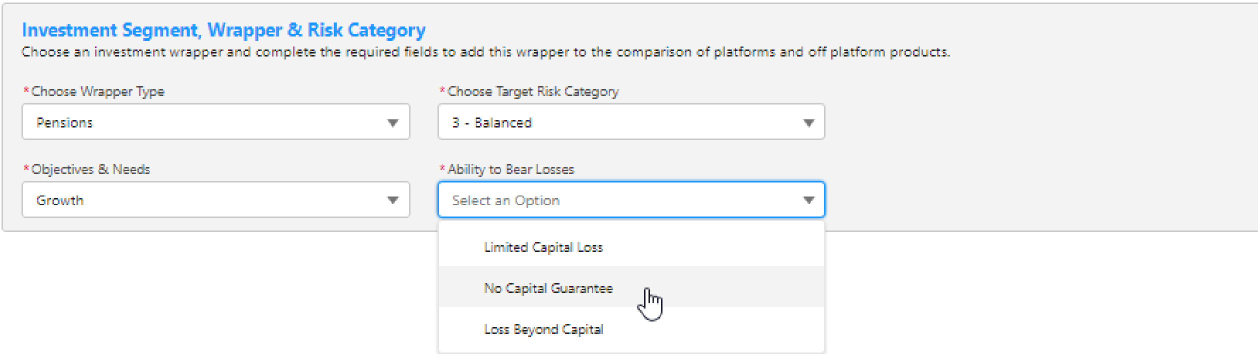


Complete the **Wrapper Type, Target Risk Category, Objective & Needs** and **Ability to Bear Losses:**

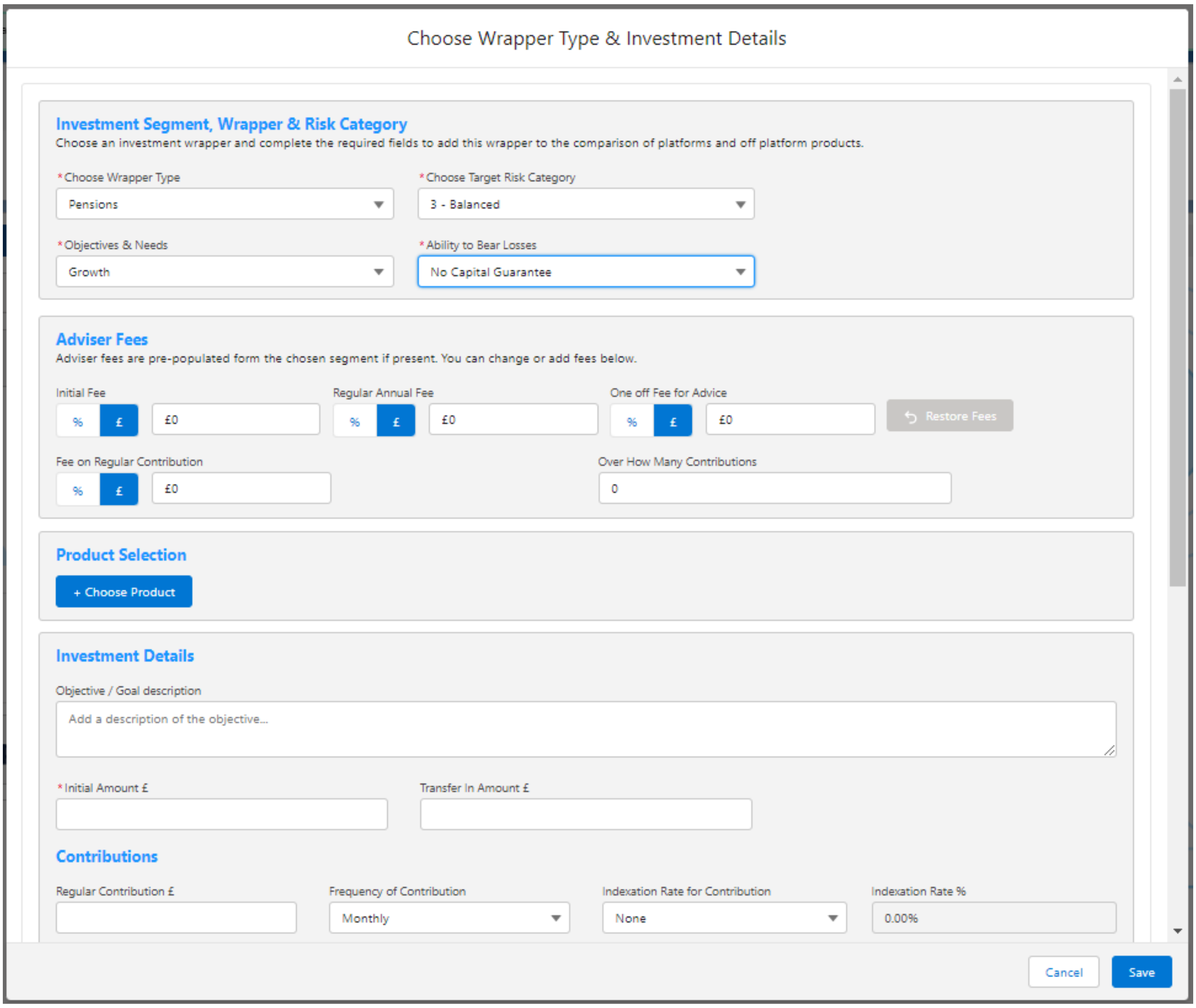






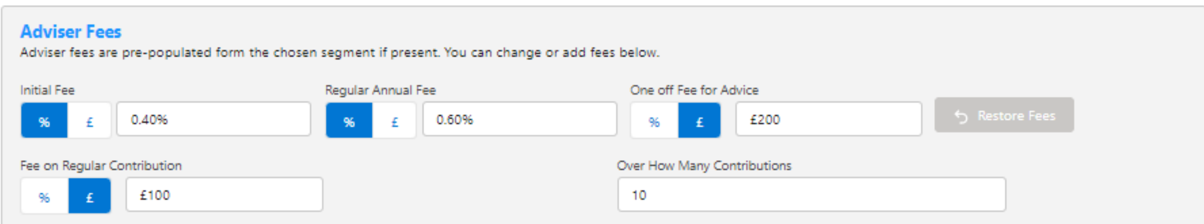


Once all fields have been completed, further detail will appear below:

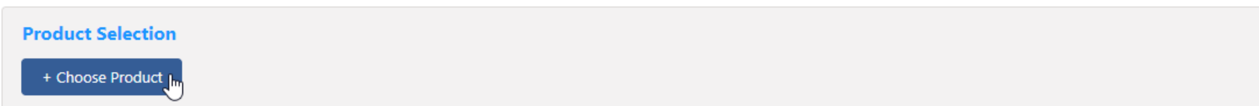


Complete the **Adviser Fees** area:

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.



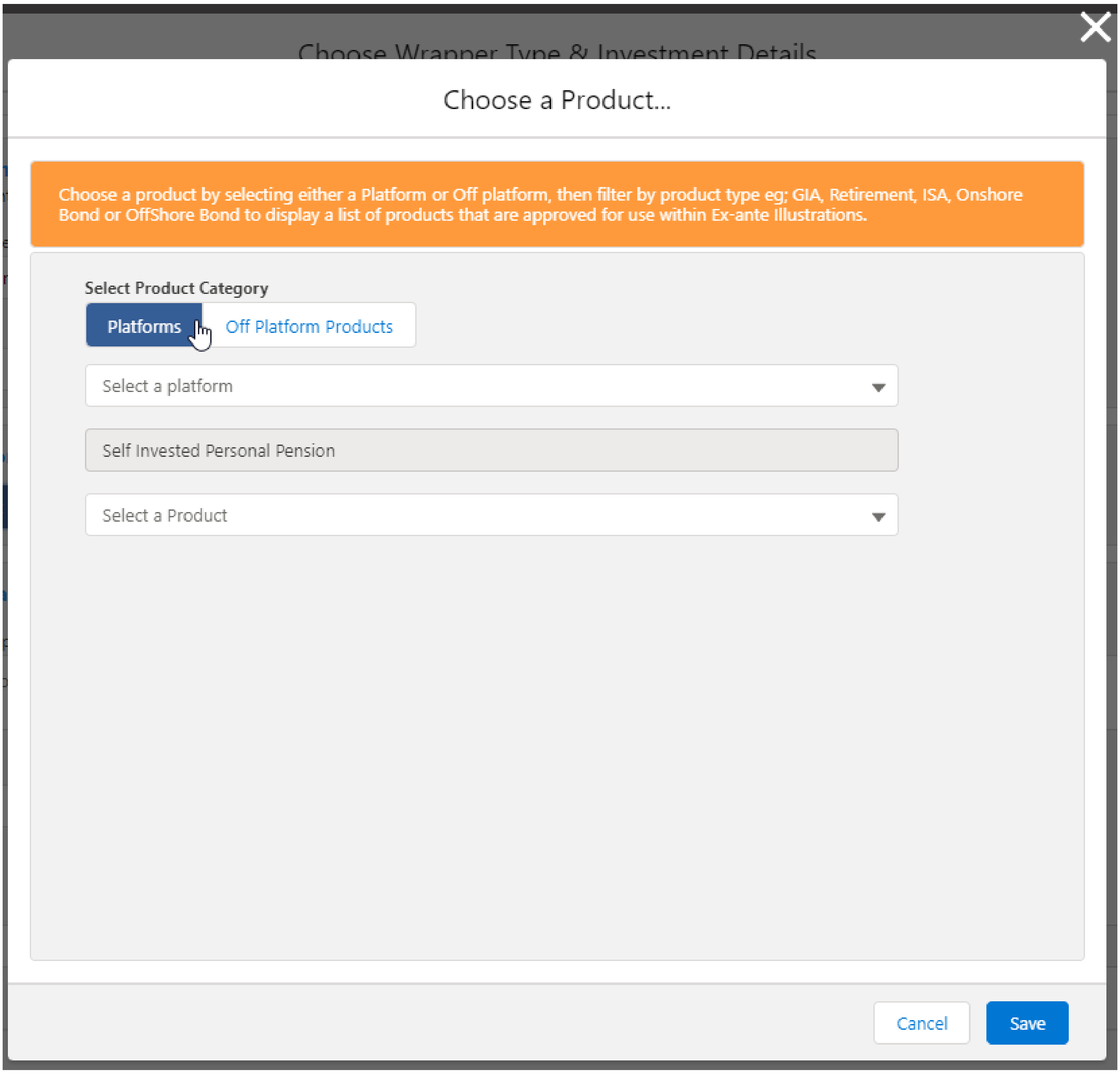
As we are completing Ex-Ante only research, you will need to select the Product to research:



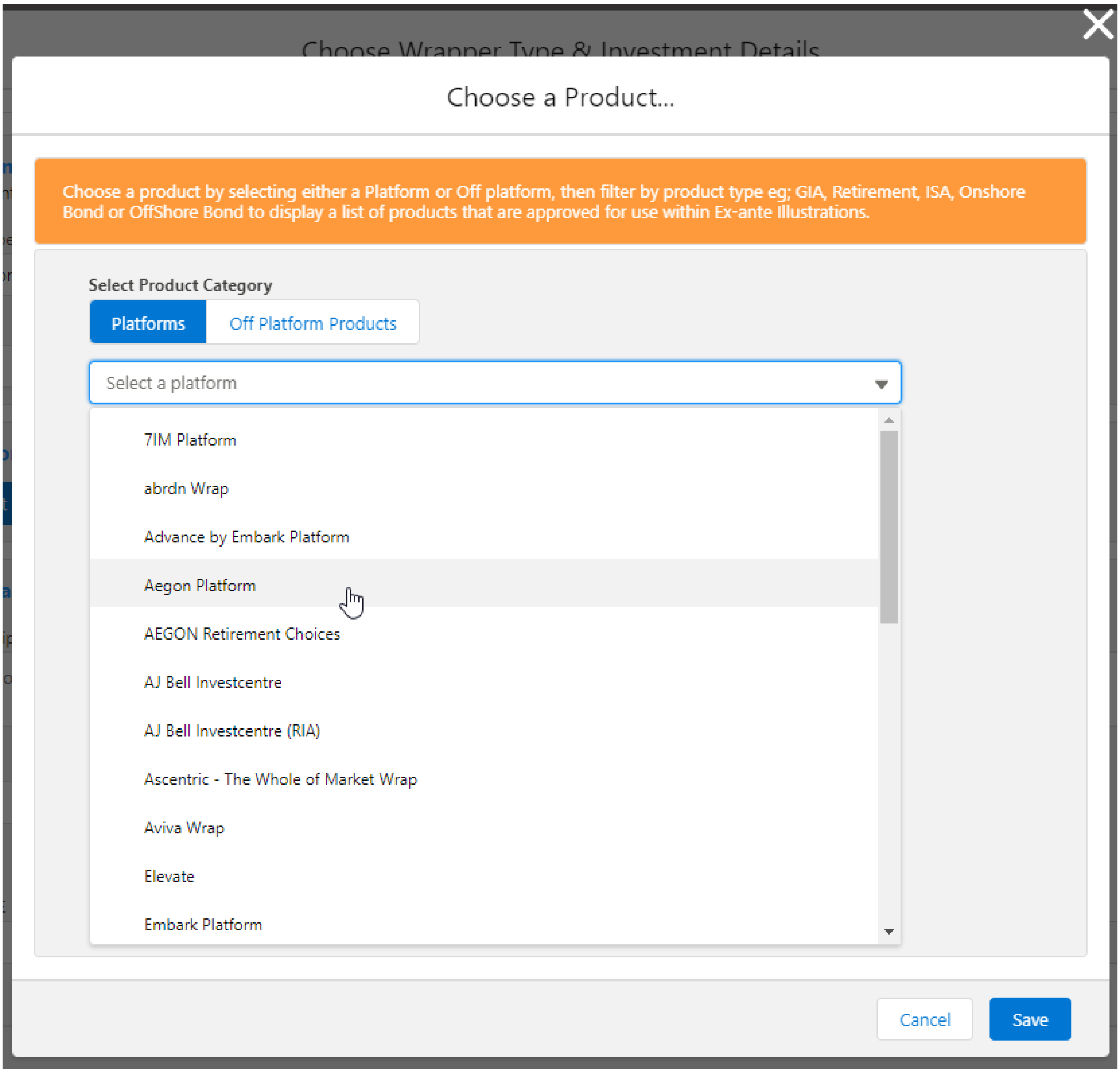
Select either **Platforms** or **Off Platform Products:.**

Please note - If using a Central Investment Proposition, only Platforms & Products

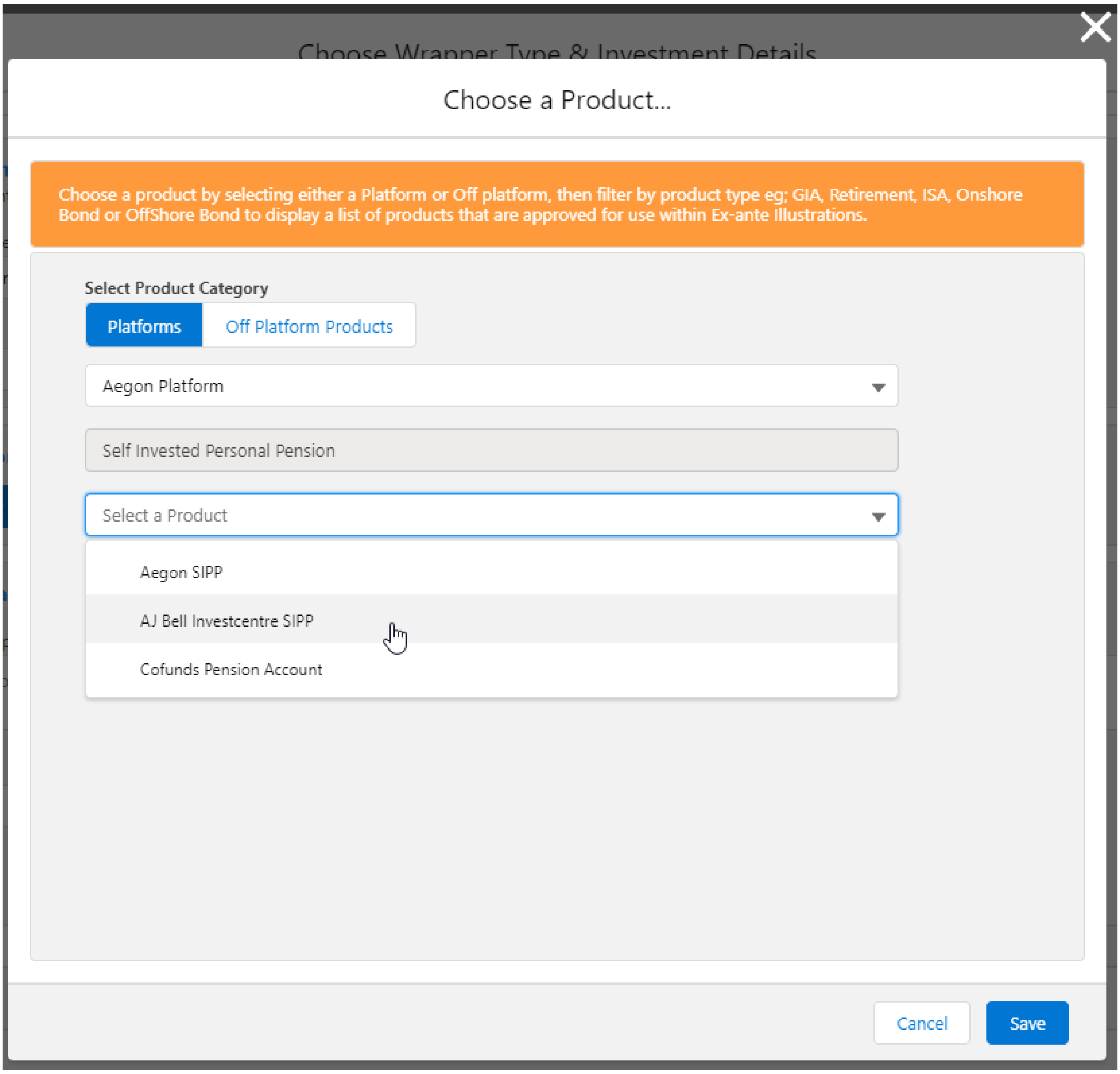
added to the CIP and assigned to the segment will appear here.



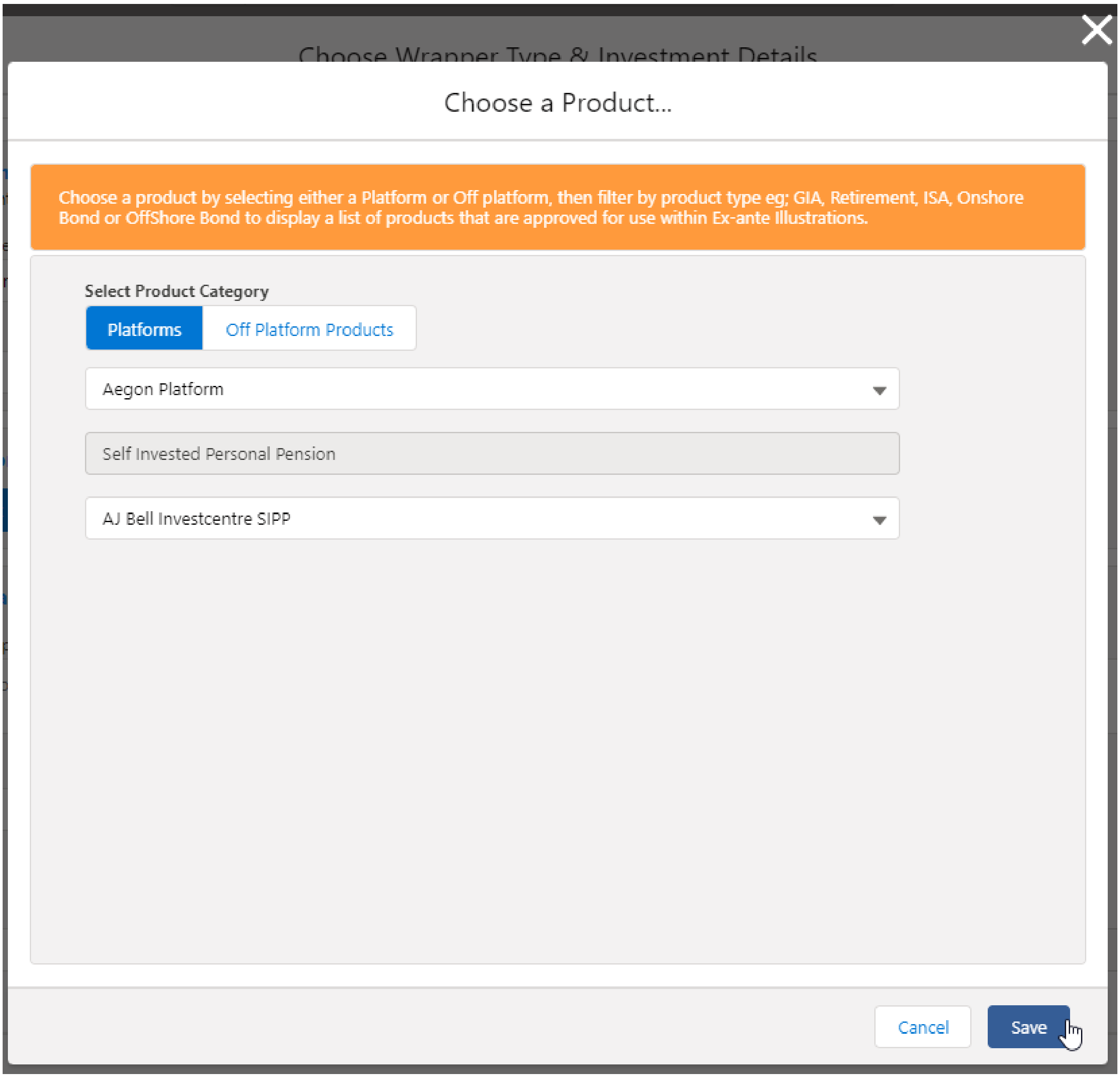
Select **Platform** from the drop down:

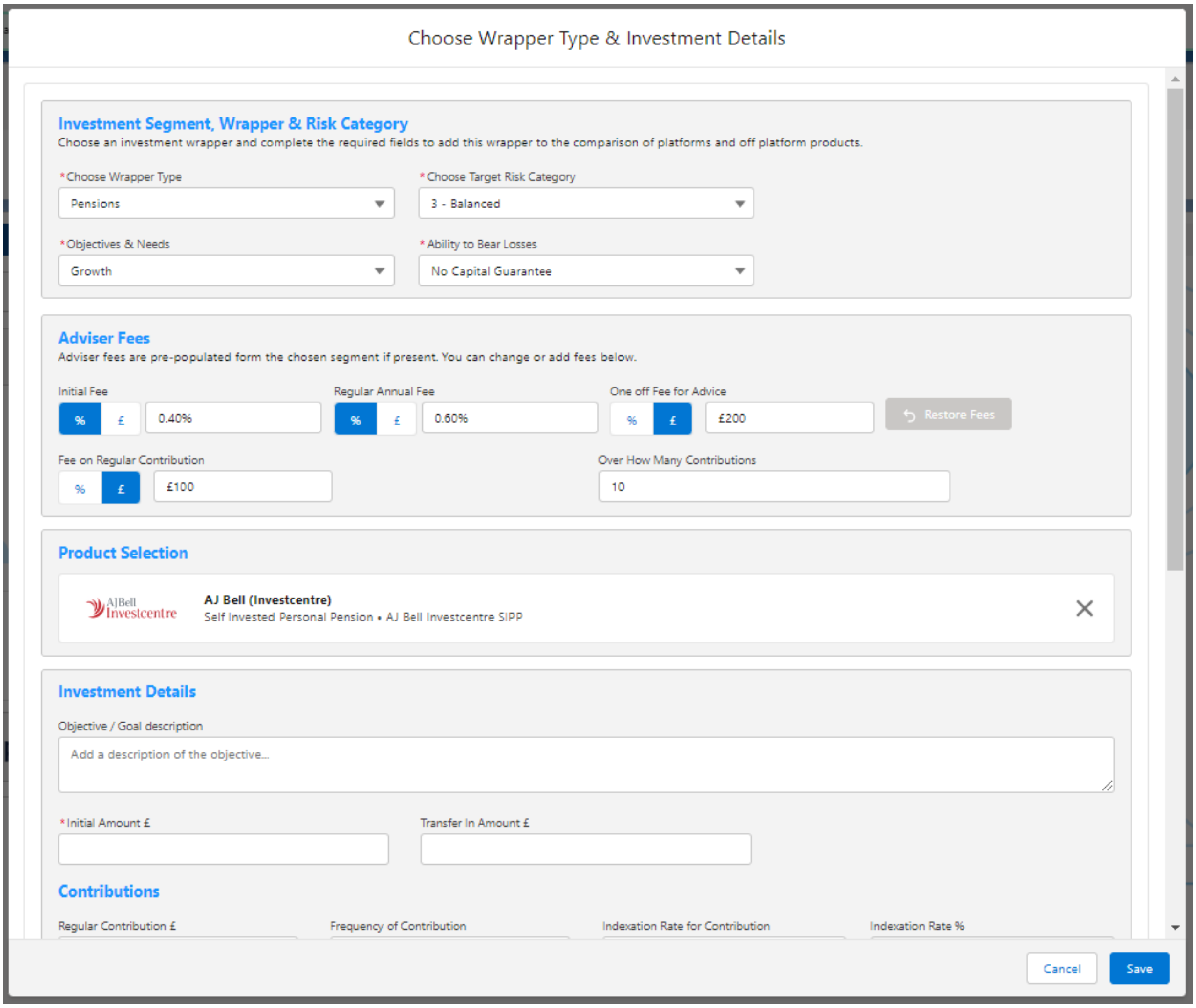


In the example below, Self Invested Personal Pension has been pulled through from the Investment Details. Select the SIPP product:

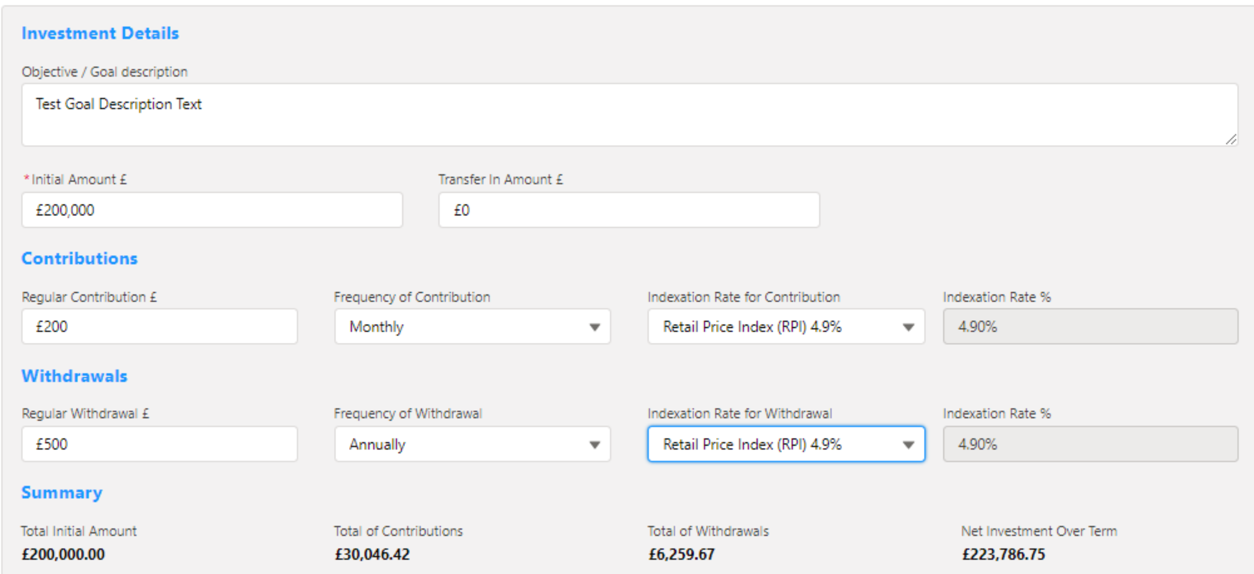

Choose Wrapper Type & Investment Details
Choose a Product...
Choose a product by selecting either a Platform or Off platform, then filter by product type eg; GIA, Retirement, ISA, Onshore Bond or OffShore Bond to display a list of products that are approved for use within Ex-ante Illustrations.
Select Product Category
Platforms
Off Platform Products
Aegon Platform
Self Invested Personal Pension
Select a Product
Aegon SIPP
AJ Bell Investcentre SIPP
Cofunds Pension Account
Cancel
Save

Save

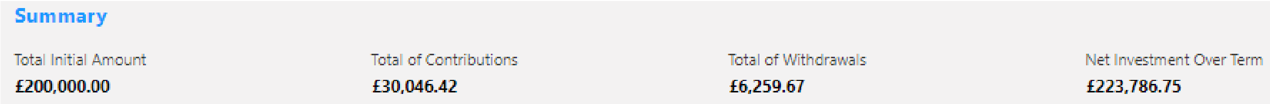

Choose Wrapper Type & Investment Details
Choose a Product...
Choose a product by selecting either a Platform or Off platform, then filter by product type eg; GIA, Retirement, ISA, Onshore Bond or OffShore Bond to display a list of products that are approved for use within Ex-ante Illustrations.
Select Product Category
Platforms
Off Platform Products
Aegon Platform
Self Invested Personal Pension
AJ Bell Investcentre SIPP
Cancel
Save



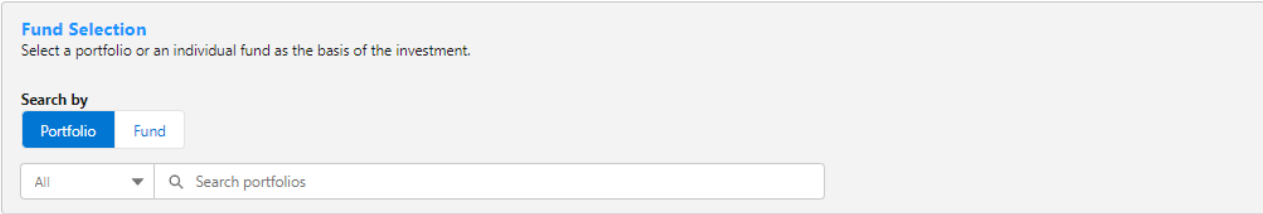
Enter the **Investment Details.**



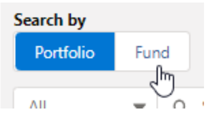
Once entered, a summary will be calculated:



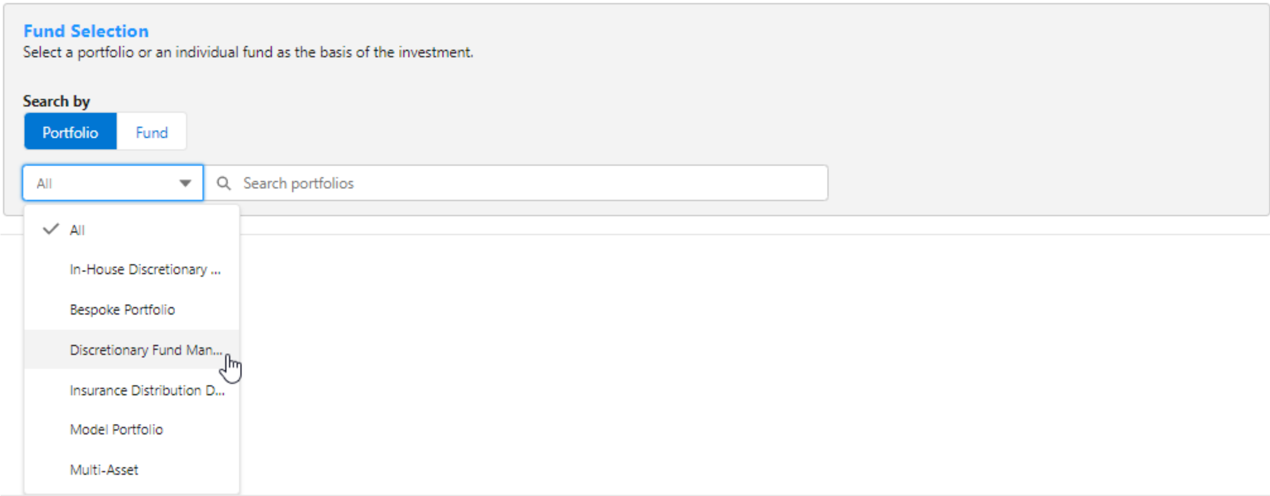
Select the **Portfolio** or **Fund** in the **Fund Selection** area:



Choose between **Portfolio** or **Fund**

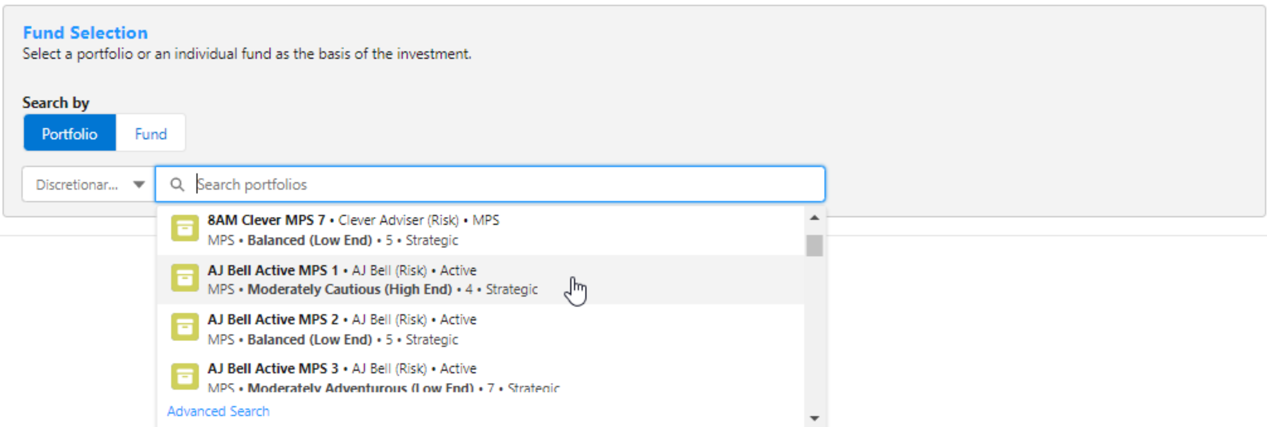


If Portfolio is selected, you are able to select the type of portfolio in the **All** drop down:



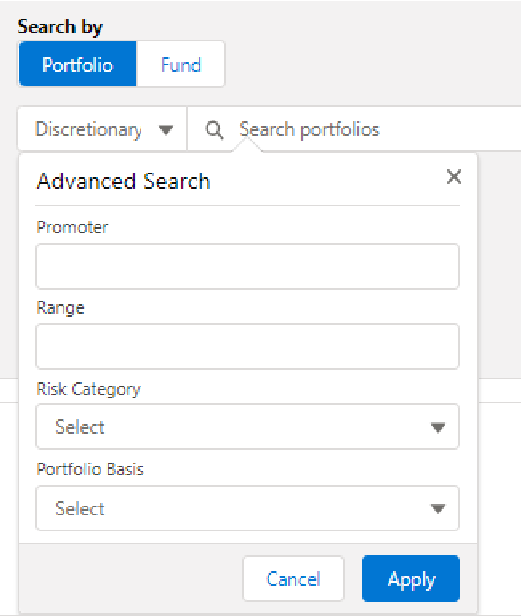
In this example, we have selected **Discretionary Fund Managers.**

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



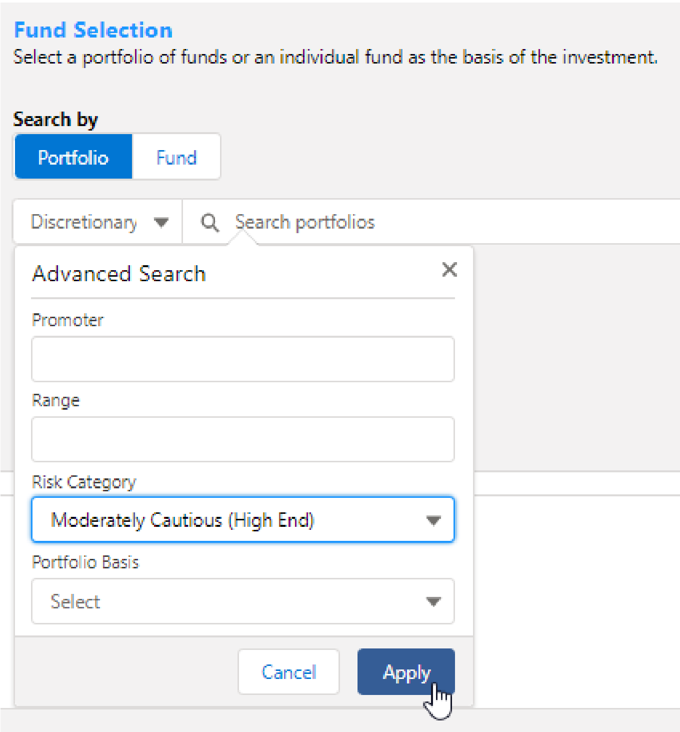
Advanced Search allows you narrow the search by **Promoter, Range, Risk Category** &

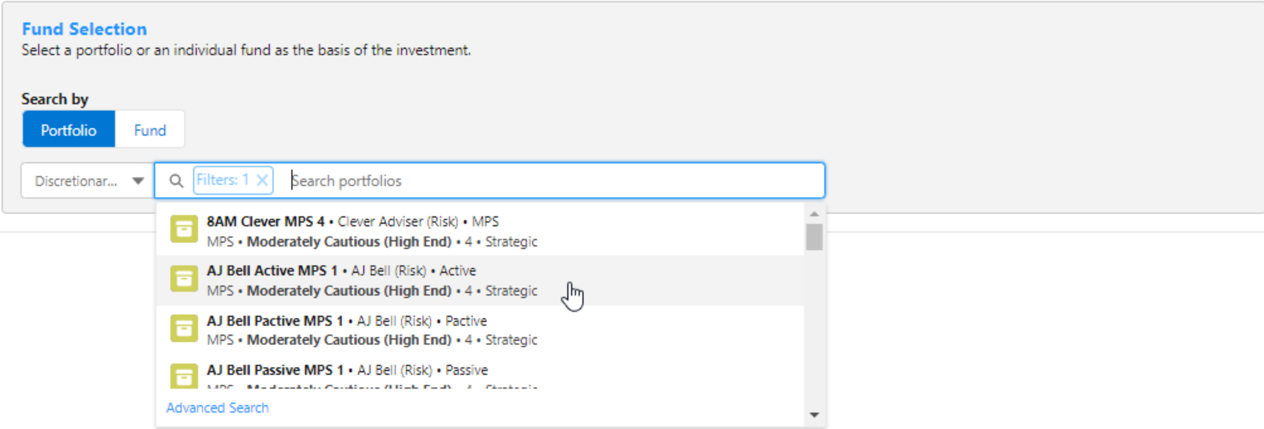
Portfolio Basis:

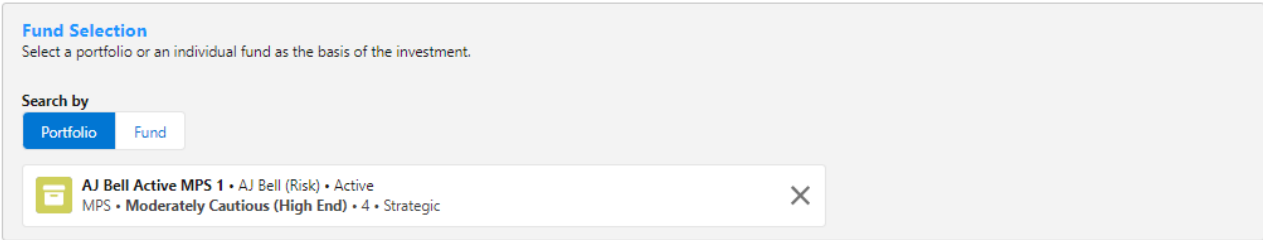


If **Risk Category** is set, this will return DFM portfolios with a risk rating of **Moderately Cautious (High End).**

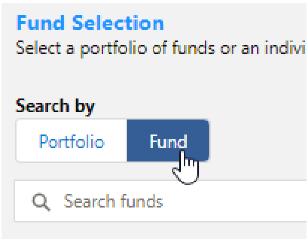
Click **Apply**:



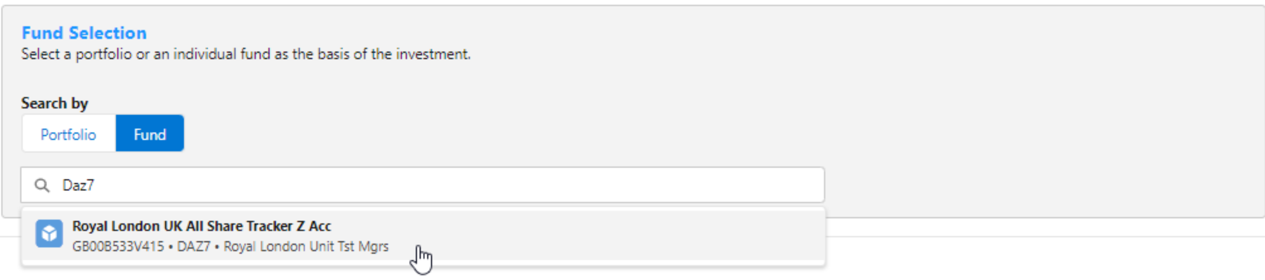


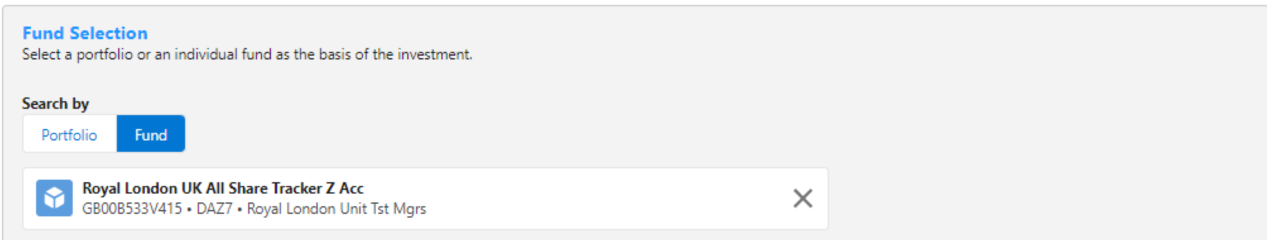


If selecting a fund, click **Fund**:

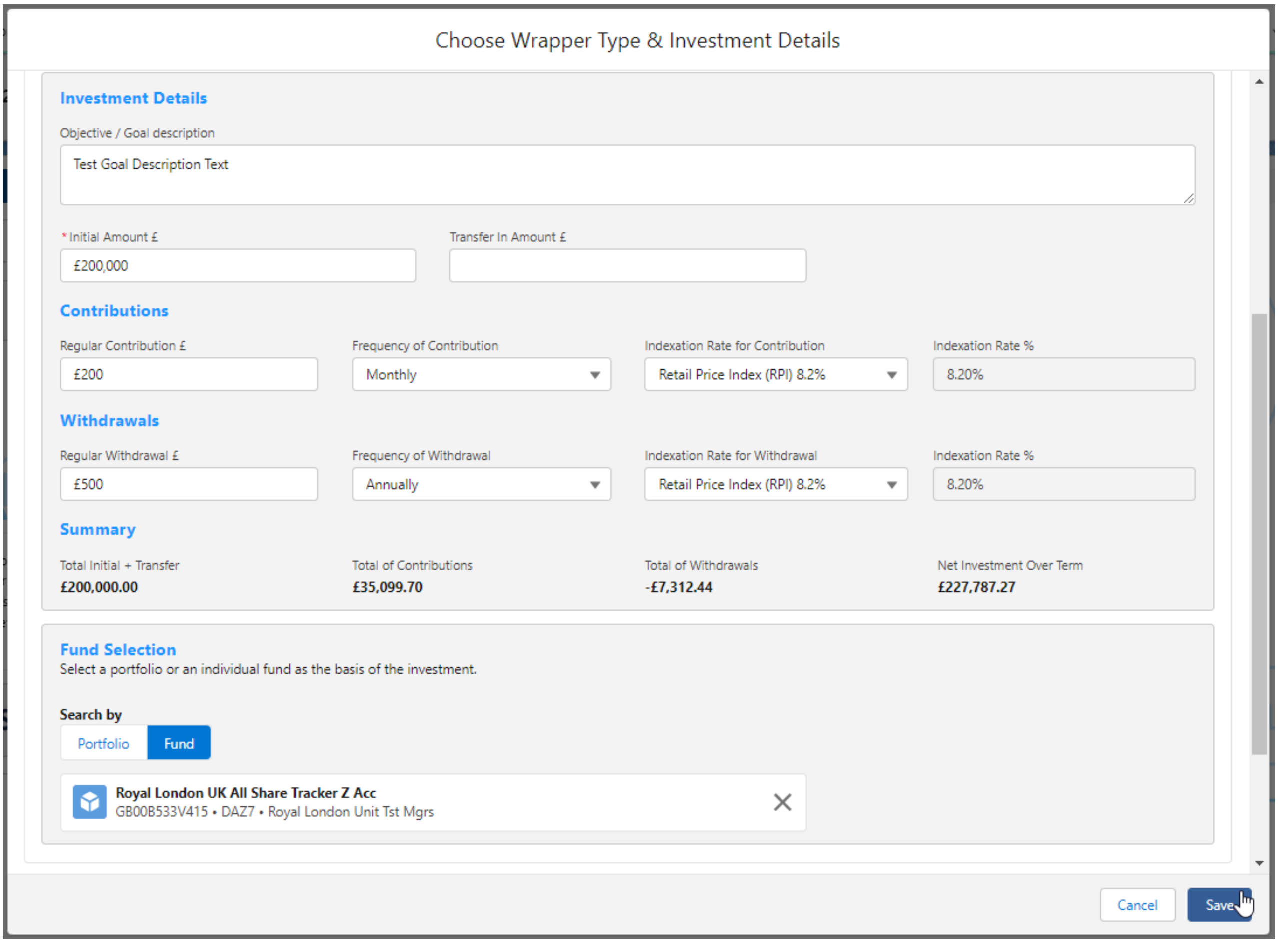


Search for funds using the fund name or fund code:





Once done, 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