

# Ex-Ante - Editing Investment Details

Last Modified on 26/05/2022 11:55 am BST

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

The screenshot shows a web interface for managing investments. At the top, there is a blue navigation bar with the word "Research" and a right-pointing arrow. Below this, there are three tabs: "Investments" (which is active), "Switches/Trades", and "Fees".

Under the "Investments" tab, there is a section titled "Add Investment +" with a plus sign. Below this, a card displays the details for a "Self Invested Personal Pension". The card includes an "Edit" button with a hand cursor pointing to it. The details shown are:

- Investment Amount: **£223,786.75**
- Risk Category: **Moderately Cau...**
- Target Fund: **Royal London UK All Share Tracker Z ...**

At the bottom of the card, there is a trash can icon on the left and a blue checkmark icon on the right. At the bottom of the entire interface, there is a logo for "SYNAPTIC SOFTWARE" featuring a stylized brain icon.

All ▾
Q Search...
✕

### 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  
Self Invested Personal Pension ▾

\* Objectives & Needs  
Growth ▾

\* Choose Target Risk Category  
4 - Moderately Cautious (High End) ▾

\* Ability to Bear Losses  
No Capital Guarantee ▾

**Product Selection**

**Quilter**

Self Invested Personal Pension • Collective Retirement Account

✕

**Investment Details**

Objective / Goal description  
Test Goal Description Text

\* Initial Amount £  
£200,000

Transfer In Amount £  
£0

**Contributions**

Regular Contribution £  
£200

Frequency of Contribution  
Monthly ▾

Indexation Rate for Contribution  
Retail Price Index (RPI) 4.9% ▾

Indexation Rate %  
4.90%

Cancel Save

Make changes and **Save**

All ▾
Q Search...
✕

### 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  
Self Invested Personal Pension ▾

\* Objectives & Needs  
Growth ▾

\* Choose Target Risk Category  
4 - Moderately Cautious (High End) ▾

\* Ability to Bear Losses  
No Capital Guarantee ▾

**Product Selection**

**Quilter**

Self Invested Personal Pension • Collective Retirement Account

✕

**Investment Details**

Objective / Goal description  
Test Goal Description Text

\* Initial Amount £  
210000

Transfer In Amount £  
£0

**Contributions**

Regular Contribution £  
£200

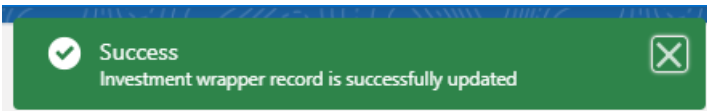
Frequency of Contribution  
Monthly ▾

Indexation Rate for Contribution  
Retail Price Index (RPI) 4.9% ▾

Indexation Rate %  
4.90%

Cancel Save

Once saved, the results will recalculate:



A screenshot of the Synaptic Pathways software interface. At the top, there is a navigation menu with items like "Synaptic Pathways", "Home", "Contacts", "Research", "Portfolio Builder", "Investment Pathways", "Configuration", "Fund Lists", "Knowledge Base", "My Apps &amp; Settings", "Valuations", and "Central Investment Propos...". A search bar is located to the right of the menu. Below the menu, a green success notification banner is visible, identical to the one in the previous image. The main content area is titled "Test Illustration Ex-ante Apr22" and includes a "Convert to Holding" button. The interface is divided into several sections: "Client" (Client Text), "Description" (Test Description Text), "Illustration Type" (Whole of Market), and "Segment Name". There are tabs for "Research", "Review", "Client Check-in", and "Report". The "Research" tab is active, showing an "Investments" section with a "Self Invested Personal Pension" card. The card displays "Investment Amount: £219,012.34" and "Risk Category: Moderately Cautio...". Below the card is the Synaptic logo. To the right of the card are filters for "Term" (set to 10), "Filter Results by Provider", "Filter Results by Product", and "Sort Results by Value" (with options for Growth %, Final Value £, Charges £, and RLY %). At the bottom of the interface, there are "Cancel" and "Continue to Ex-ante Illustration" buttons.