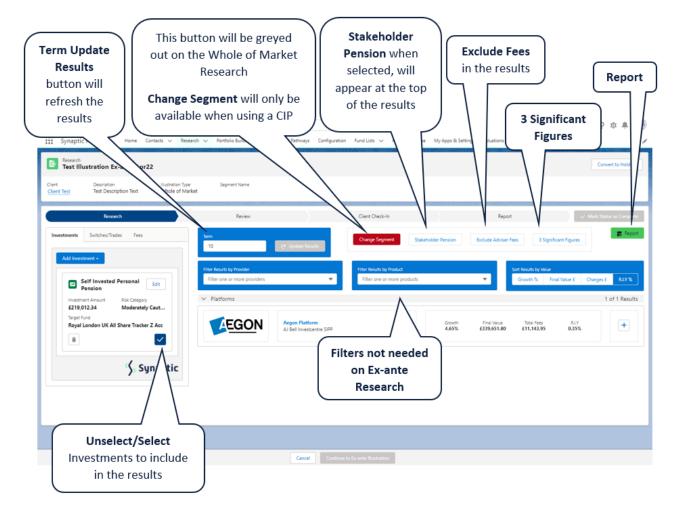
Ex-Ante - Research Filtering

Last Modified on 26/05/2022 11:57 am BST



Term



When updating the term, click Update Results

Term 15	C ^e Update Results	Change Segment Stakehol	Ider Pension	Exclude Advise	Fees 3 Sign	nificant Figures		💼 Repo
Filter Results by Provider		Filter Results by Product			Sort Results by Value	:		
Filter one or more providers	•	Filter one or more products		•	Growth %	Final Value £	Charges £	R.I.Y %
 Platforms 							1 0	f 1 Resu
EGON	Aegon Platform AJ Bell Investcentre SIPP		Growth 4.65%	Final Value £339,651.80	Total Fees £11,143.95	R.I.Y 0.35%		+

Filter Results by Provider

Ex-Ante only Research is based on selecting a single product.

Filter Results by Product

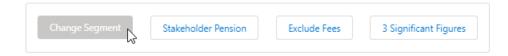
Ex-Ante only Research is based on selecting a single product.

Sort Results by Value

Ex-Ante only Research is based on selecting a single product.

Change Segment

This button will be disabled on Whole of Market Research:



If using a Central Investment Proposition, the button will be available to select and will allow you to change segment:

Change Segment	Stakeholder Pension	Exclude Fees	3 Signific	ant Figures		
Basis of Illustration	\geq		Client Check-I	In	\geq	
		Choose				
Select a segment from th	a list to use as the basis for	this illustration OR e	nable Whole of N	Jarkat 'moda' tr	a coloct from all a	a se de la
	le list to use as the basis for			viai ket mode to	o select from all a	available
products and funds.	ie list to use as the basis for			Market mode to	select from an a	avallable
products and funds. hoose Segment Segment 1 Test	ie list to use as the basis for		Whole of Market	Disabled	select nom an a	available
products and funds. hoose Segment			Whole of Market		o select normali a	available
products and funds. hoose Segment			Whole of Market			available

Stakeholder Pension

When Stakeholder Pension is selected, it will be displayed at the top of the results screen:

Change Segment	Stakeholder Pension Jm	Exclude Fees	3 Significant Figures
	\frown		

Research	Review	Client Check-In	Report	✓ Mark Status as Complete
Investments Switches/Trades Fees	Term 10 C ^{er} Update Res	Change Segment Stakeholder	Pension In Exclude Adviser Fees 3 Sig	nificant Figures
Add Investment -	Filter Results by Provider Filter one or more providers Stakeholder Pension	Filter Results by Product Filter one or more products	Sort Results by Value Growth %	e Final Value £ Charges £ RLY % 1 of 1 Results
Target Fund Royal London UK All Share Tracker Z Acc	Stakeholder Basic Pension	Pension for Comparison Purposes	Growth Final Value Total Fees 3.71% £311,443.72 £39,352.02	R⊥Y 1.29%
Synaptic	Platforms Aegon Platfo Al Bell Investu		Growth Final Value Total Fees 4.65% £339,651.80 £11,143.95	RLY 0.35%

If a Retirement wrapper is not added to the research, **Stakeholder Pension** button will be disabled.

Exclude Fees

When **Exclude Fees** is selected, the results screen will recalculate.

Change Segment Sta	keholder Pension Exc	lude Fees 🕅 3 Signifi	icant Figures		
Research	Review	Client Check-In	Rep	ort 🗸 🗸	lark Status as Complete
Investments Switches/Trades Fees Add Investment + Solf Invested Personal Edit	Tem 10 C* Update R Filter Reuts by Provider Filter one or more provides	Change Segment s	itskeholder Pension Exclude Advise	Sort Results by Value	Report
Investment Amount Risk Category	✓ Platforms				1 of 1 Results
E219,012.34 Moderately Caut Target Fund Royal London UK All Share Tracker Z Acc	Algon Plat AJ Bell Inves		Growth Final Value 4.65% £339,651.80	Total Fees R.LY £11,143.95 0.35%	+
Synaptic					

3 Significant Figures

When selected, 3 significant will be displayed in the Results.

Research Review Client Check-In westments Switches/Trades Fees Term 10 C* Update Results Change Segment Stakeholder Pension Add Investment + Titler Results by Provider Filter Results by Provider Filter Results by Provider Filter one or more providers Filter one or more providers	Report V Mark Status as Comp
Add Investment + Fitter Results by Provider Fit	
	Soft Results by Value Growth % Final Value £ Charges £ RLY*
Pension Univestment Amount Rick Category E219,012.34 Moderately Caut Target Find Royal London UK All Share Tracker Z Acc C C C C C C C C C C C C C C C C C C	