

Ex-Post Reviews - How to create a review

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Ex-post reviews can be conducted from a holding that has been converted from ex-ante research. For more information on how to create a comparison with ex-ante or ex-ante research, see [here](#).

Navigate to the holding you would like to review:

The screenshot shows the Synaptic Pathways interface for a contact named 'Ms. Client Test'. The 'Holdings' section is expanded, showing two categories: 'Off-Platform Holdings (2)' and 'Platform Holdings (1)'. The 'Off-Platform Holdings' table lists:

Name	Provider Name	Contract Reference	Current Value
Aberdeen Multi-Manager Unit Tru			£224,013.20
Personal Pension Fully Insured	Personal Pension Fully Insured	HD7R4	£100,901.40

The 'Platform Holdings' table lists:

Name	Provider Name	Contract Reference	Current Value
Quilter	Quilter	7YT67HJ	£135,000.00

On the right side, there is an 'Activity' section with options for 'New Task', 'New Event', 'Log a Call', and 'Email'. Below this is an 'Upcoming & Overdue' section with a message: 'No next steps. To get things moving, add a task or set up a meeting. No past activity. Past meetings and tasks marked as done show up here.'

Click **Review** at the top right of the screen:

The screenshot shows the 'Review' screen for the 'Personal Pension | Fully Insured' holding. The top right corner has buttons for 'Risk Rate Holding', 'Review', 'Edit', and 'Delete'. The 'Review' button is highlighted. Below the header, there is a summary of the holding:

Client: Client Test, Current Value: £100,901.40, Current Risk Rating: 7 | Moderately Adventurous (Low End)

The 'Details' section is expanded, showing the following information:

Name	Description	Start Date	End Date
Personal Pension Fully Insured	Test Personal Pension Description	01/02/2022	01/02/2032

Other details include: Remaining Term: 10, Review Date: 01/02/2023, Rolling Term Basis, Last Modified Date: 01/04/2022, 15:09, and Surrender/Transfer Value: 100,000.00.

The 'Contributions (1)' section shows a table with one contribution:

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
C-000011	Regular	Monthly	£200.00	Retail Price Index (...)	7.80%	01/04/2022	01/04/2032

The 'Weighting By Funds' section features a donut chart with the following data:

- 44.94% - Vanguard LifeStrategy 60% Equity A Acc
- 19.76% - JIM AAP Adventurous C Acc
- 18.23% - HSBC Global Strategy Conservative Portfolio C Acc
- 17.08% - Liontrust MA Passive Intermediate S Acc

The 'Performance Chart' section shows a line graph with the y-axis labeled 'Sum of Value' ranging from 0 to 100k and the x-axis labeled 'Date' with a single data point for 01/04/2022.

If the holding is currently in review, you will be asked to **Start new Session** or **Select Existing session**:

An existing review is in progress, select new review to start again or continue to resume the existing session

[Start new Session](#) [Select Existing session](#)

If you have selected an existing session, a list of reviews will be displayed. Click the + to open the review:

An existing review is in progress, select new review to start again or continue to resume the existing session

[Start new Session](#) [Select Existing session](#)

+ Ex-Post Test Review • 2022-02-01
Personal Pension • Aviva Life & Pensions UK Limited • Personal Pension (Fully Insured)

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Personal Pension • Aviva Life & Pensions UK Limited • Personal Pension (Fully Insured)

If starting a new review, enter the **Ex-Post Name** and **Submit**:

Enter Ex-post Detail

*Ex-post Name

Ex-Post Test Review

[Submit](#)

Success
Navigating you to Ex-post Journey.

This will take you to the review screen:

The screenshot displays the Synaptic Pathways software interface for an Ex-post Review. At the top, the navigation bar includes the Synaptic Pathways logo, a search bar, and various menu items: Home, Contacts, Research, Portfolio Builder, Investment Pathways, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, and Valuations. The main header shows the review title 'Client Test' with 'Edit', 'Delete', and 'Change Owner' options. Below this, a table lists the review details: Ex-post Name (Ex-Post Review), Start Date (06/04/2022), and End Date (06/04/2032). A progress bar indicates the current stage is 'Review', with 'Client Check-In' and 'Report' as subsequent steps. A 'Mark Status as Complete' button is also present. The 'Review Workbench' section contains several tool icons: Stochastic Forecast, Deterministic Forecast, Suitability, Costs & Charges, Capacity for Loss, Compliance Details, and Report Content. The main workspace is divided into four panels: 'Previous' (Last Reviewed State), 'Current' (Current State: 6 Apr 2022), 'Proposal' (Optimise and Reset buttons), and 'What's Shown Here' (Choose the basis of the review and create a target recommendation). A 'Continue to Client Check-In' button is located at the bottom of the interface.

For further information on Ex-Post Reviews, see article [Ex-Post Reviews - Review Screen](#)