

# Comparison & Ex-Ante - Adviser Fees

Last Modified on 13/02/2024 3:34 pm GMT

Adviser Fees can be added/amended through the **Fees** tab:

The screenshot shows the Synaptic Pathways software interface. The main header includes navigation links like Home, Research, Portfolio Builder, and Investment Pathways. The current view is for a 'Research' session titled 'Susanna Comparison w/ Ex-ante'. The 'Fees' tab is selected, showing a table of investment platforms. The table has columns for Growth, Final Value, Total Fees, and RLY. The 'Add Fees Per Investment' button is visible in the top right of the table area.

| Platform                   | Growth | Final Value | Total Fees | RLY   |
|----------------------------|--------|-------------|------------|-------|
| P1 Investment Management   | 3.81%  | £372,074.03 | £41,765.05 | 1.19% |
| James Hay Partnership      | 3.78%  | £371,337.17 | £42,501.90 | 1.22% |
| Fidelity Adviser Solutions | 3.78%  | £371,269.31 | £42,569.76 | 1.22% |
| Fidelity Adviser Solutions | 3.78%  | £371,269.31 | £42,569.76 | 1.22% |

If you have chosen to set Adviser Fees per Investment, the **Add Fees Per Investment** button will be enabled and fees will be greyed out. You will need to edit each investment in the Investments tab to change the fees per wrapper.

Investments Trades **Fees** AUM

[+ Add Fees \(Optional\)](#)  
Provide the fees to be applied for the comparison calculation.

Add Fees Per Investment  Active

Initial Fee  
% £ 0.40%

Regular Annual Fee  
% £ 0.60%

One off Fee for Advice  
% £ £200.00

Fee on Regular Contribution  
% £ 0.20%

Over How Many Contributions  
0

[Update Fees](#)

**NOTE:** When more than one wrapper exists in the comparison any fees specified as £ are applied on a weighted basis across all wrapper instances.

If you would like to disable fees per investment, untick the **Add Fees Per Investment** button and complete the fee information:

Investments Trades **Fees** AUM

[+ Add Fees \(Optional\)](#)  
Provide the fees to be applied for the comparison calculation.

Add Fees Per Investment  Inactive

Initial Fee  
% £ 0.40%

Regular Annual Fee  
% £ 0.60%

One off Fee for Advice  
% £ £200.00

Fee on Regular Contribution  
% £ 0.20%

Over How Many Contributions  
0

[Update Fees](#)

**NOTE:** When more than one wrapper exists in the comparison any fees specified as £ are applied on a weighted basis across all wrapper instances.

Click **Update Fees +** to apply to the Results:

Investments Trades **Fees** AUM

**+ Add Fees (Optional)**  
Provide the fees to be applied for the comparison calculation.

Add Fees Per Investment  Inactive

Initial Fee  
% £ 0.40%

Regular Annual Fee  
% £ 0.60%

One off Fee for Advice  
% £ £300.00

Fee on Regular Contribution  
% £ 0.20%

Over How Many Contributions  
0

**Update Fees**

**NOTE:** When more than one wrapper exists in the comparison any fees specified as £ are applied on a weighted basis across all wrapper instances.

Research: **Susanna Comparison w/ Ex-ante** Convert to Holding

Client: Susanna West | Description: Test Description Text | Illustration Type: Whole of Market | Segment Name: | Policy Type: |

Research | Review | Client Check-in | Report

Investments Trades Fees AUM

**+ Add Fees (Optional)**  
Provide the fees to be applied for the comparison calculation.

Add Fees Per Investment  Inactive

Initial Fee  
% £ 0.40%

Regular Annual Fee  
% £ 0.60%

One off Fee for Advice  
% £ £300.00

Fee on Regular Contribution  
% £ 0.20%

Over How Many Contributions  
0

**Update Fees**

**NOTE:** When more than one wrapper exists in the comparison any fees specified as £ are applied on a weighted basis across all wrapper instances.

Time: 10 Update Results

Change Segment | Exclude Adviser Fees | 3 Significant Figures

Filter Results by Provider: Filter one or more providers

Filter Results by Product: Filter one or more products

Sort Results by Value: Growth % | Final Value £ | Charges £ | R.I %

**Update Fees**

Cancel | Continue to Ex-ante Illustration

The button will be greyed out once applied.

Investments Trades **Fees** AUM

[+ Add Fees \(Optional\)](#)  
Provide the fees to be applied for the comparison calculation.

Add Fees Per Investment  Inactive

Initial Fee

Regular Annual Fee

One off Fee for Advice

Fee on Regular Contribution

Over How Many Contributions

**NOTE:** When more than one wrapper exists in the comparison any fees specified as £ are applied on a weighted basis across all wrapper instances.

The button will become available again if any changes are made.

---