## Comparison & Ex-Ante - Trades

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

Add switch information through the **Trades** tab.

Research Susanna Comparison w/ Ex-ante			7 - TPWS-111			Z 1805244	<i>F117</i> ***10	Convert to Holding
Client Description Illustration Type Segm Susanna West Test Description Text Whole of Market	tent Name Policy Type						2011	
Research	Review	Client Check	k-in			Report		✓ Mark Status as Complete
Investments Trades Fees AUM	Term 10 C' U;	Change Seg	gment	er Pension Ex	clude Adviser Fees	3 Significant Figures		Report
Add Investment +	Filter Results by Provider Filter one or more providers	Filter Results by	y Product			Sort Results by Growth %	/alue Final Value £	Charges £ RLY %
Pensions Edit	<ul> <li>Platforms</li> </ul>	Timer one of	noie products			Cititat 2		37 of 37 Results
E239,691.57 Balanced (High End) Tager Find Vonguard LifeStrategy 60% Equity A Shares Acc		P1 Investment Management The P1 SIPD • P1 (SA		Growth 3.84%	Final Value £373,243.65	Total Fees £40,595.43	R.LY 1.16%	+
Individual Savings Accounts		James Hay Partnership Modular ISIPP • Modular Stock: & Shares ISA		Growth 3.78%	Final Value £371,337.17	Total Fees £42,501.90	RLY 1.22%	+
22.520.00 Balanced (High End) Toper Fund Vanguard LifeStrategy 40% Equity A Shares Acc	F	Fidelity Adviser Solutions Fidelity Personal Pension • Fidelity (No Investor Fee)		Growth 3.78%	Final Value £371,269.31	Total Fees £42,569.76	RLY 1.22%	+
Synaptic	ŧ	Fidelity Adviser Solutions Fidelity (No Investor Fee) + Fidelity Personal Pension		Growth 3.78%	Final Value £371,269.31	Total Fees £42,569.76	RLY 1.22%	+
	Standard Life	Elevate Elevate Pension Investment Account + Elevate Stocks & Shares ISA - Ex	xplicit	Growth 3.77%	Final Value £370,938.43	Total Fees £42,900.64	RU.Y 1.23%	+
wascriptvoid(0)		Cancel Continue to Ex-ante Illustration						
Investments Trades Fees All + Add Trades (Cprionary) Provide a number of trades, the frequent balance to trade. Trades (Buy/Sell) 0	JM cy and percentage of th	e value						
Frequency of Trades								
Monthly		•						
% of Current Balance to Trade								
0.00%								
Value Balance is determined during the lapplied.	R.I.Y calculation when th	e trade is						

The **Set Trades +** button will become available once information is complete. **Set Trades +** to apply to the Results:

			quency and percentage of the value
Trades (Buy/	Sell)		
4			
Frequency of Monthly			
% of Current 15.00%	Balance to Tr	ade	
Value Balano is applied.	ce is determi	ned during	the R.I.Y calculation when the trade

The button will be greyed out once applied.



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