

Basis of Illustration - Mark Wrapper as Reviewed

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Once all tabs have been reviewed and the Capacity for Loss statement has been completed, you can check the box next to the Investment:

Review

Select a wrapper to review the results, complete the capacity for loss statement and add commentary for compliance and reporting.

Mark as reviewed by selecting the checkbox for each item.

 **PLATFORM** Platform
The P1 Platform

Individual Savings Accounts

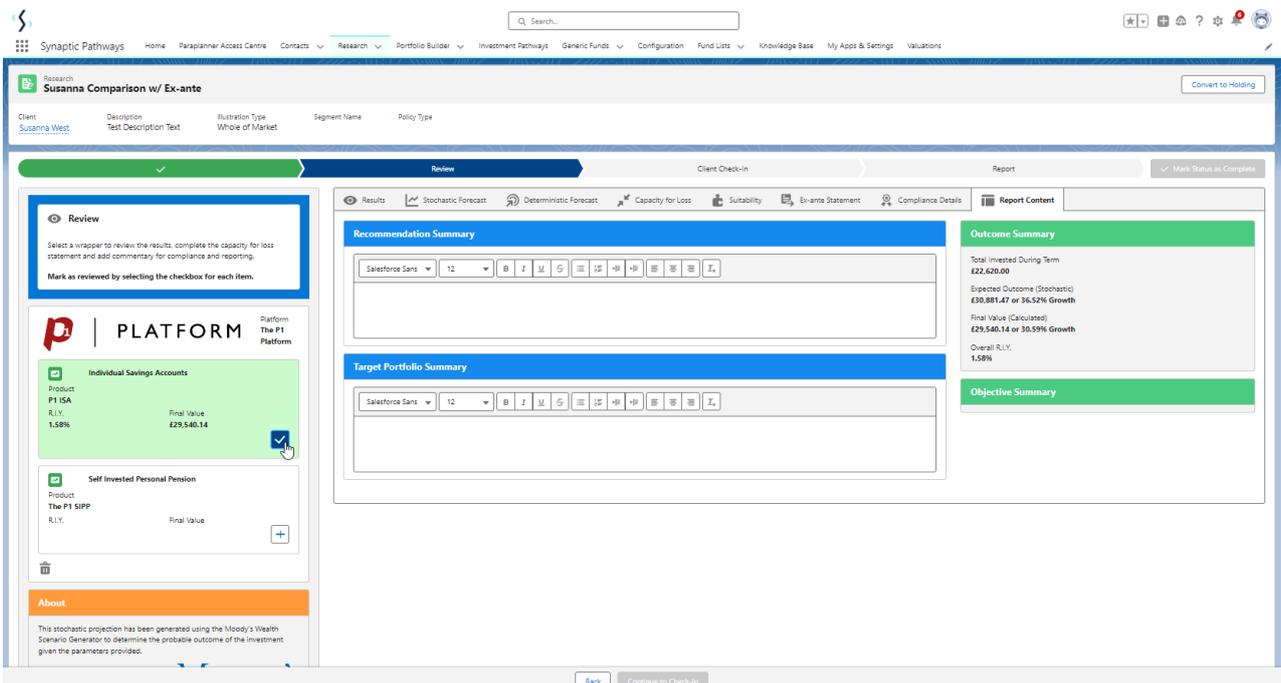
Product
P1 ISA
R.I.Y.
1.58%

Final Value
£29,540.14

Self Invested Personal Pension

Product
The P1 SIPP
R.I.Y.

Final Value



The screenshot shows the full software interface. At the top, there is a navigation menu with options like 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Generic Funds', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. A search bar is also present.

The main content area is titled 'Susanna Comparison w/ Ex-ante' and includes a 'Convert to Holding' button. Below this, there are tabs for 'Review', 'Client Check-in', and 'Report'. The 'Review' tab is active, showing the same 'Review' panel as in the previous image, but with a checked checkbox next to the 'Individual Savings Accounts' item.

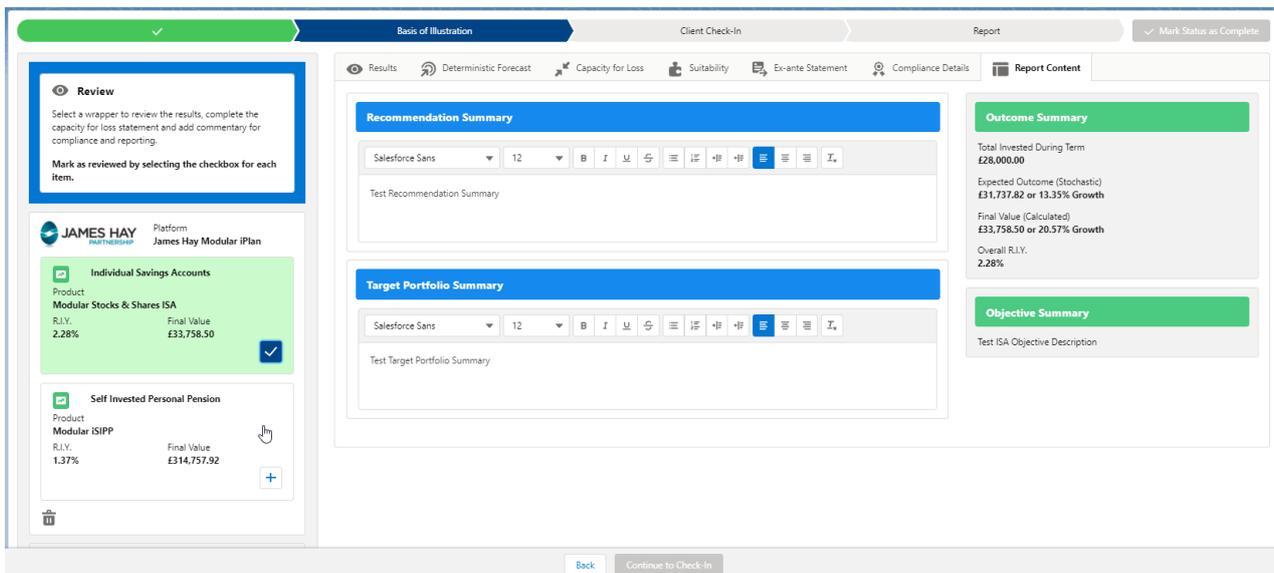
On the right side of the interface, there are several summary panels:

- Recommendation Summary**: Includes a dropdown menu set to 'Salesforce Sans' and a date '12', along with various icons for data manipulation.
- Target Portfolio Summary**: Similar to the Recommendation Summary, with a dropdown set to 'Salesforce Sans' and date '12'.
- Outcome Summary**:
 - Total Invested During Term: £22,620.00
 - Expected Outcome (Stochastic): £30,881.47 or 36.52% Growth
 - Final Value (Calculated): £29,540.14 or 33.59% Growth
 - Overall R.I.Y.: 1.58%
- Objective Summary**: A section with a green header.

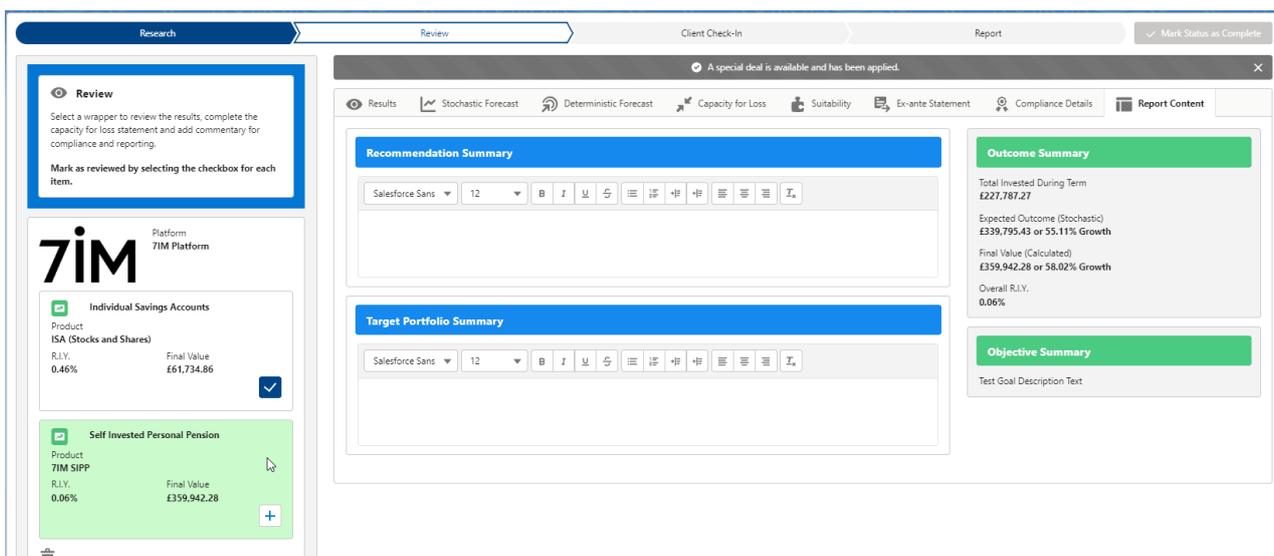
At the bottom of the interface, there are 'Back' and 'Continue to Check-in' buttons.

If this is the only investment, you can proceed to the Check-In stage.

If you have multiple investments, you will need to review each investment separately:



Repeat the review process, completing the Capacity for Loss statement before marking as reviewed.



Review

Select a wrapper to review the results, complete the capacity for loss statement and add commentary for compliance and reporting.

Mark as reviewed by selecting the checkbox for each item.

7IM

Platform
7IM Platform

 **Individual Savings Accounts**

Product
ISA (Stocks and Shares)

R.I.Y.	Final Value
0.46%	£61,734.86

 **Self Invested Personal Pension**

Product
7IM SIPP

R.I.Y.	Final Value
0.06%	£359,942.28



All investments have been reviewed, proceed to the **Check-in** screen.

[Back](#) [Continue to Check-In](#)

See article [Client Check-in](#).
