

# Comparison & Ex-Ante - Research Report

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

A Report can be created on the Research report:

**Susanna Comparison w/ Ex-ante**

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

Research | Review | Client Check-in | Report | Mark Status as Complete

Investments | Trades | Fees | AUM

Term: 10 | Update Results

Change Segment | Stakeholder Pension | Exclude Adviser Fees | 3 Significant Figures | Report

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 £ | RLY %

Platforms (37 of 37 Results)

Platform	Growth	Final Value	Total Fees	RLY %
PLATFORM   P1 Investment Management (P1 ISA + The P1 SIPP)	3.80%	£371,926.80	£41,912.28	1.20%
JAMES HAY PARTNERSHIP   James Hay Partnership (Modular Stocks & Shares ISA + Modular SIPP)	3.78%	£371,191.10	£42,647.98	1.22%
Fidelity   Fidelity Adviser Solutions (Fidelity (No Investor Fee) + Fidelity Personal Pension)	3.78%	£371,123.54	£42,715.54	1.22%
Fidelity   Fidelity Adviser Solutions (Fidelity (No Investor Fee) + Fidelity Personal Pension)	3.78%	£371,123.54	£42,715.54	1.22%
Standard Life   Elevate (Elevate Stocks & Shares ISA - Explicit + Elevate Pension Investment Account)	3.77%	£370,794.89	£43,044.19	1.23%

Cancel | Continue to Ex-ante Illustration

You can either view the report or download:

**Synaptic Platform Comparison Summary**

Prepared For: Susanna West | Report Date: 11th October 2023 | Illustration Name: Susanna Comparison w/ Ex-ante | Firm Name: Synaptic Pathways UAT

Product Selection

Selected Products: Individual Savings Accounts, Pensions

Individual Savings Accounts

Summary of Investment, Contributions and Withdrawals

Initial Investment	Transfer In	Contributions over the Period	Withdrawal over the Period	Total Invested Over the Period
£8,620.00	£0.00	£18,000.00	£1,000.00	£13,000.00

Fund(s) Selected

Fund Name	Weighting %	Amount £
Vanguard LifeStrategy 40% Equity A Shares Acc	100%	£8,620.00

Pensions

Initial Investment | Transfer In | Contributions over the Period | Withdrawal over the Period | Total Invested Over the Period

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