

# Ex-Ante - Editing Investment Details

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

Edit wrapper Investment details through the **Edit** button:

The screenshot displays a web interface for managing investments. At the top, there is a blue navigation bar with the word "Research" in white. Below this, a tabbed interface shows "Investments" as the active tab, with "Switches/Trades" and "Fees" as alternative tabs. A blue button labeled "Add Investment +" is positioned at the top left of the main content area. The central focus is a card for a "Self Invested Personal Pension". This card includes a green icon with a white line graph, the title "Self Invested Personal Pension", and an "Edit" button with a hand cursor icon. Below the title, two rows of data are shown: "Investment Amount" with the value "£223,786.75" and "Risk Category" with the value "Moderately Cau...". A "Target Fund" section below that lists "Royal London UK All Share Tracker Z ...". At the bottom left of the card is a trash can icon, and at the bottom right is a blue square button with a white checkmark. The Synaptic Software logo, featuring a colorful brain icon and the text "SYNAPTIC SOFTWARE", is located at the bottom center of the interface.

All ▾
Q Search...
✕

### Choose Wrapper Type & Investment Details

**Investment Segment, Wrapper & Risk Category**  
Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

\* Choose Wrapper Type  
Self Invested Personal Pension ▾

\* Choose Target Risk Category  
4 - Moderately Cautious (High End) ▾

\* Objectives & Needs  
Growth ▾

\* Ability to Bear Losses  
No Capital Guarantee ▾

**Product Selection**

Quilter  
Self Invested Personal Pension • Collective Retirement Account
✕

**Investment Details**

Objective / Goal description  
Test Goal Description Text

\* Initial Amount £  
£200,000

Transfer In Amount £  
£0

**Contributions**

Regular Contribution £  
£200

Frequency of Contribution  
Monthly ▾

Indexation Rate for Contribution  
Retail Price Index (RPI) 4.9% ▾

Indexation Rate %  
4.90%

Cancel Save

Make changes and **Save**

All ▾
Q Search...
✕

### Choose Wrapper Type & Investment Details

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**Product Selection**

Quilter  
Self Invested Personal Pension • Collective Retirement Account
✕

**Investment Details**

Objective / Goal description  
Test Goal Description Text

\* Initial Amount £  
210000

Transfer In Amount £  
£0

**Contributions**

Regular Contribution £  
£200



Frequency of Contribution  
Monthly ▾

Indexation Rate for Contribution  
Retail Price Index (RPI) 4.9% ▾

Indexation Rate %  
4.90%

Cancel Save

Once saved, the results will recalculate:



**Success**  
Investment wrapper record is successfully updated

Synaptic PathwaysHomeContactsResearchPortfolio BuilderInvestment PathwaysConfigurationFund ListsKnowledge BaseMy Apps & SettingsValuationsCentral Investment Propos...

ResearchTest Illustration Ex-ante Apr22Success  
Investment wrapper record is successfully updatedConvert to Holding

Client  
Client TestDescription  
Test Description TextIllustration Type  
Whole of MarketSegment Name

ResearchReviewClient Check-inReportMark Status as Complete

Investments


Switches/Trades

Fees

**Self Invested Personal Pension** Edit

Investment Amount: £219,012.34    Risk Category: Moderately Cautio...

Target Fund: Royal London UK All Share Tracker Z Acc




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 %



Cancel Continue to Ex-ante Illustration