

Ex-Ante - Research Screen

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In the example below, we have added a **Self Investment Personal Pension** as an investment. If you are unsure of how to add investments, see article [Ex-Ante - Add Investment](#) for details.

The screenshot shows the 'Research' screen for a 'Test Illustration Ex-ante Apr22'. The client is 'Client Test', the description is 'Test Description Text', and the illustration type is 'Whole of Market'. The screen is divided into several sections: 'Investments', 'Review', 'Client Check-In', and 'Report'. The 'Investments' section shows a 'Self Invested Personal Pension' with an investment amount of £219,012.34 and a risk category of 'Moderately Cau...'. The 'Review' section includes a 'Term' of 10, a 'Filter Results by Provider' dropdown, and a 'Filter Results by Product' dropdown. The 'Client Check-In' section has a 'Change Segment' button and options for 'Stakeholder Pension', 'Exclude Adviser Fees', and '3 Significant Figures'. The 'Report' section has a 'Report' button and a 'Mark Status as Complete' checkbox. The 'Platforms' section shows a table with 1 of 1 results for 'Aegon Platform'.

| Platform | Growth | Final Value | Total Fees | R.I.Y |
|---|--------|-------------|------------|-------|
| Aegon Platform AJ Bell Investcentre SIPP | 4.65% | £339,651.80 | £11,143.95 | 0.35% |

Review the details of your chosen Investment:

This screenshot is identical to the one above, showing the 'Self Invested Personal Pension' investment details and the 'Aegon Platform' result.

Growth, Final Value, Total Fees and R.I.Y are displayed next to each result:

This is a close-up of the 'Platforms' section from the screenshot above, showing the 'Aegon Platform' result with its associated metrics.

| Platform | Growth | Final Value | Total Fees | R.I.Y |
|---|--------|-------------|------------|-------|
| Aegon Platform AJ Bell Investcentre SIPP | 4.65% | £339,651.80 | £11,143.95 | 0.35% |

