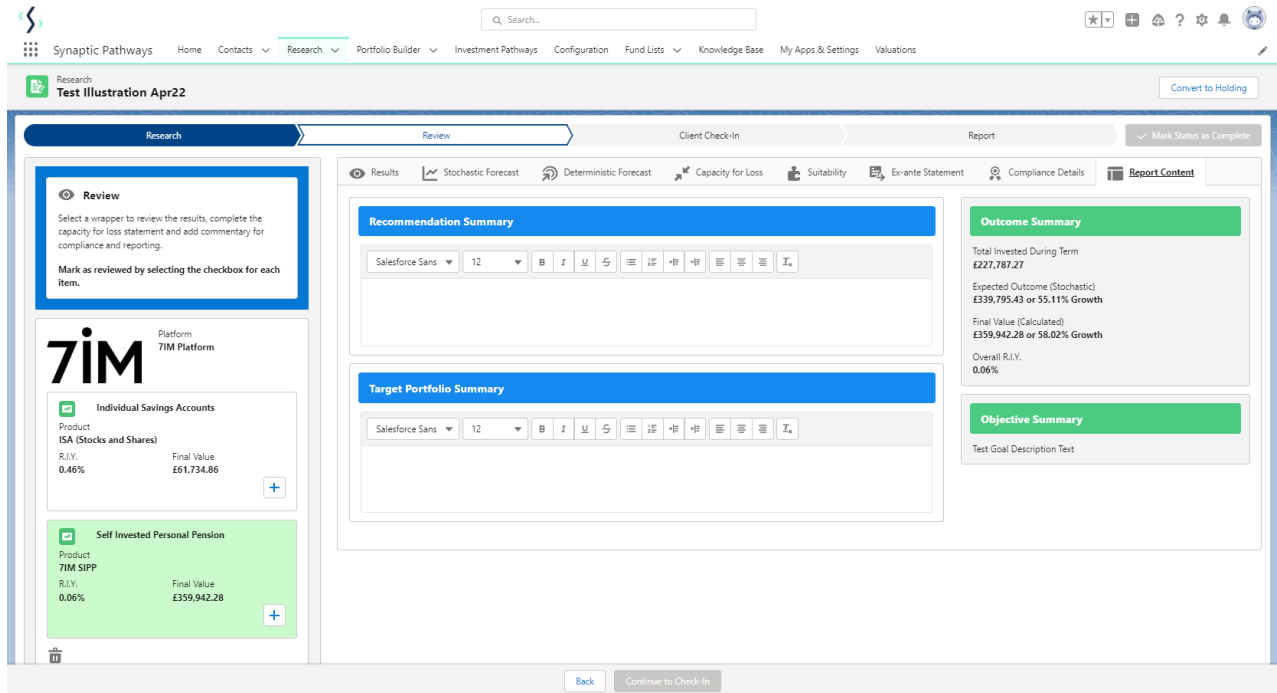


# Ex-Ante - Basis of Illustration - Report Content

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

**Report Content** contains a **Recommendation Summary** and **Target Portfolio Summary**. When completed, they will appear on the report.



The **Outcome Summary** will display **Total Invested During Term**, **Expected Outcome (Stochastic)**, **Final Value (calculated)** & **Overall R.I.Y**

### Outcome Summary

Total Invested During Term  
**£45,712.24**

Expected Outcome (Stochastic)  
**£59,672.13 or 65.41% Growth**

Final Value (Calculated)  
**£61,734.86 or 35.05% Growth**

Overall R.I.Y.  
**0.46%**

**Objective Summary** will pull through from the text entered in the Research>Add Investment screen.

## Objective Summary

Test ISA Objective Description

**Report Content** is the last tab to review.

Check the box next to the Investment to mark 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.

0.46%

Final Value

£61,734.86



### Self Invested Personal Pension

Product

7IM SIPP

R.I.Y.

0.06%

Final Value

£359,942.28



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Research Test Illustration Apr22 Convert to Holding

Research Review Client Check-in Report Mark Status as Complete

A special deal is available and has been applied.

Results Stochastic Forecast Deterministic Forecast Capacity for Loss Suitability Ex-ante Statement Compliance Details Report Content

**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  
**7IM**  
7IM Platform

**Individual Savings Accounts**

Product  
ISA (Stocks and Shares)

R.I.Y. 0.46% Final Value **£61,734.86**

**Self Invested Personal Pension**

Product  
7IM SIPP

R.I.Y. 0.06% Final Value **£359,942.28**

**Recommendation Summary**

Salesforce Sans 12 B I U S

**Target Portfolio Summary**

Salesforce Sans 12 B I U S

**Outcome Summary**

Total Invested During Term  
**£45,712.24**

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**Objective Summary**

Test ISA Description

Back Continue to Check-in

See article [Ex-Ante - Basis of Illustration - Mark Wrapper as Reviewed](#)