

Ex-Ante - Switches/Trades

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Add switching information through the **Switches/Trades** tab.

The screenshot shows the Synaptic Pathways Ex-Ante interface. The main header includes navigation tabs: Research, Review, Client Check-In, and Report. The 'Research' tab is active, showing a 'Test Illustration Ex-ante Apr22'. Below the header, there are several sections: 'Investments' with a 'Self Invested Personal Pension' card, 'Switches/Trades' (highlighted), and 'Fees'. The 'Switches/Trades' section contains a 'Term' input (10), 'Update Results' button, 'Change Segment' button, 'Stakeholder Pension' button, 'Exclude Adviser Fees' button, and '3 Significant Figures' button. There are also filters for 'Filter Results by Provider' and 'Filter Results by Product'. A table shows results for 'Aegon Platform' with columns for Growth (4.65%), Final Value (£340,000), Total Fees (£11,100), and R.I.Y. (0.35%).

The close-up shows the 'Switches/Trades' tab with the following fields and options:

- + Add Trades (Optional)**: Provide a number of trades, the frequency and percentage of the value balance to trade.
- Trades (Buy/Sell)**: Input field with value 0.
- Frequency of Trades**: Dropdown menu with value Monthly.
- % of Current Balance to Trade**: Input field with value 0.00%.
- Value Balance is determined during the R.I.Y calculation when the trade is applied.**
- Set Trades +**: Button to apply the settings.

The **Set Trades +** button will become available once information is complete. **Set Trades +** to apply to the Results:

Investments **Switches/Trades** Fees

[+ Add Trades \(Optional\)](#)
Provide a number of trades, the frequency and percentage of the value balance to trade.

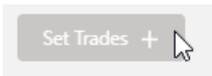
Trades (Buy/Sell)

Frequency of Trades

% of Current Balance to Trade

Value Balance is determined during the R.I.Y calculation when the trade is applied.

The button will be greyed out once applied.



The button will become available again if any changes are made.
