

Comparison & Ex-Ante using a CIP - 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 CIP

Client: Susanna West | Description: Test Description | Illustration Type: Segment | Segment Name: Segment 1 | Policy Type: Segment 1

Term: 10 | Update Results

Change Segment | Stakeholder Pension | Exclude Adviser Fees | 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 %

Platform	Growth	Final Value	Total Fees	RLY %
AJ Bell Investcentre AJ Bell Investcentre SIPP + AJ Bell Investcentre Investment ISA	3.76%	£376,474.72	£44,496.16	1.24%
transact1 Transact Transact Wrap SIPP + Transact Wrap ISA	3.76%	£376,426.17	£44,544.70	1.24%
transact1 Transact Transact Wrap ISA + Transact Wrap Personal Pension	3.76%	£376,426.17	£44,544.70	1.24%
7iM Seven Investment Management 7iM SIPP + ISA (Stocks and Shares)	3.75%	£376,126.08	£44,844.79	1.25%
7iM Seven Investment Management The Premier Trust + ISA (Stocks and Shares)	3.74%	£375,750.55	£45,220.33	1.26%

You can either view the report or download:

Synaptic Platform Comparison Summary

Prepared For: Susanna West
Report Date: 16th October 2023
Illustration Name: Susanna Comparison w/Ex-ante CIP
Firm Name: Synaptic Pathways UAT
Address: Synaptic Pathways UAT, 100, The Quadrant, London, E1 1RN

Product Selection

Selected Products:

- Pensions
- Individual Savings Accounts

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
£8,652.00	£10,000.00	£12,000.00	£1,000.00	£7,000.00

Fund(s) Selected

Fund Name	Weighting %	Amount £
Vanguard LifeStrategy 20% Equity A-Gross Acc-GBP	37%	£6,801.24
Vanguard LifeStrategy 80% Equity A	63%	£11,750.76

Pensions

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