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:

Research Susanna Comparison w/Ex-ante CIP		22275 (TETZ - SSSSA - DIII//2 - DUAS2		APASSILI.		Convert to Holding
Client Description Illustration Type Segment Nar Susanna West Test Description Segment Segment 1	ne Polícy Type					
Research	Review	Client Check-In		Report		✓ Mark Status as Complete
Investments Trades Fees AUM Add Investment •	Term 10 C ^{et} Update Results	Change Segment Stal	Exclude Adviser	Fees 3 Significant Figures		Report Report
Pensions Ece Investment Amount Rois Censory 233,825.70 Balanced (High End) Tage Portolo Auto B	Filter Results by Provider Filter one or more providers	Filter Results by Product Filter one or more products		Sort Results by Growth %		Charges £ RJ.Y %
	✓ Platforms 11					
	AJBell AJBell (Investcentre) AJBell Investcentre SIPP	AJ Bell Investcentre Investment ISA		Value Total Fees 474.72 £44,496.16	RLY 1.24%	
Individual Savings Accounts Eat Intermet Amount Risk Carigory 12,56,62,600 Balanced (High End) Taget Fortols Auto	transac Taniatt Transact Wrap SIPP • Trans			Value Total Fees 426.17 £44,544.70	R.L.Y 1.24%	+
	transac Tresact Transact Wrap ISA - Trans	act Wrap Personal Pension		Value Total Fees 426.17 £44,544.70	R.L.Y 1.24%	+
5 Synaptic	7iM SPP • ISA (Stocks an			Value Total Fees 126.08 £44,844.79	RLY 1.25%	+
	7im Seven Investment Man. The Premier Trust + ISA (S			Value Total Fees 750.55 £45,220.33	RJY 1.26%	+
1	Cancel	Continue to Ex-ante Illustration				

You can either view the report or download:

Synaptic Platform Col	nparison Summary				는, Download Report
Prepared For Susanna West					
Report Date					
16th October 2023					
Illustration Name					
Susanna Comparison w/Ex-ante CIP					
Firm Name					
Synaptic Pathways UAT					
Address					
 Second Street Association Street Stree					
1000					
Company of Compan					
Product Selection					
Selected Products					
Pensions					
 Individual Savings Accounts 					
Individual Savings Accounts					
Summary of Investment, Contributions and Withdrawa	:				
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	£5,000.00	£7,000.00	
Fund(s) Selected					
Fund Name		Weighting %	Amount £		
Vanguard LifeStrategy 20% Equity A Gross Acc GBP		37%	£6,901.24		
Vanguard LifeStrategy 80% Equity A		63%	£11,750.76		
vanguard Litestrategy 80% Equity A		0370	£11,750.76		
Pensions					

