

Comparison & Ex-Ante using a CIP - Editing Investment Details

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

Edit wrapper Investment details through the **Edit** button:

The screenshot displays the Synaptic investment management interface. At the top, there is a blue navigation bar with the word "Research" and a right-pointing arrow. Below this, a tabbed interface shows "Investments" as the active tab, with other tabs for "Trades", "Fees", and "AUM". A blue button labeled "Add Investment +" is positioned at the top left of the investment list. The main content area features a card for a "Pensions" investment, which includes an "Edit" button with a hand cursor pointing to it. The investment details are as follows:

Investment Amount	Risk Category
£239,691.57	Balanced (High End)
Target Fund Vanguard LifeStrategy 60% Equity A Shares...	

At the bottom of the investment card, there is a trash icon on the left and a blue checkmark icon on the right. The Synaptic logo is located at the bottom center of the interface.

Choose Wrapper Type & Investment Details

Investment Segment, Wrapper & Risk Category

Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type

Pensions

* Choose Target Risk Category

6 - Balanced (High End)

* Objectives & Needs

Growth

* Ability to Bear Losses

No Capital Guarantee

Investment Details

Objective / Goal description

Test Objective/Goal Description

* Initial Amount £

£10,562.00

Transfer In Amount £

£200,263.00

Contributions

Regular Contribution £

£200.00

Frequency of Contribution

Monthly

Indexation Rate for Contribution

Retail Price Index (RPI) 9%

Indexation Rate %

9.00%

Withdrawals

Regular Withdrawal £

£500.00

Frequency of Withdrawal

Annually

Indexation Rate for Withdrawal

Retail Price Index (RPI) 9%

Indexation Rate %

9.00%

Summary

Total Initial + Transfer

£210,825.00

Total of Contributions

£36,463.03

Total of Withdrawals

-£7,596.46

Net Investment Over Term

£239,691.57

Cancel

Save

Make changes and **Save**

Choose Wrapper Type & Investment Details

Investment Segment, Wrapper & Risk Category
Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

*Choose Wrapper Type: *Choose Target Risk Category:

*Objectives & Needs: *Ability to Bear Losses:

Investment Details

Objective / Goal description:

*Initial Amount £: Transfer In Amount £:

Contributions

Regular Contribution £: Frequency of Contribution: Indexation Rate for Contribution: Indexation Rate %:

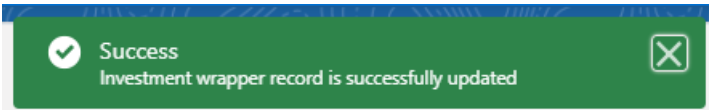
Withdrawals

Regular Withdrawal £: Frequency of Withdrawal: Indexation Rate for Withdrawal: Indexation Rate %:

Summary

Total Initial + Transfer	Total of Contributions	Total of Withdrawals	Net Investment Over Term
£210,825.00	£36,463.03	-£7,596.46	£239,691.57

Once saved, the results will recalculate:



Q Search...

Synaptic Pathways Home Paraplanner Access Centre Contacts **Research** Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Susanna Comparison w/ Ex-ante Success Investment wrapper record is successfully updated Convert to Holding

Client: Susanna West Description: Test Description Text Illustration Type: Whole of Market Segment Name: Policy Type:

Research
Review
Client Check-in
Report
Mark Status as Complete

Investments Trades Fees AUM

Add Investment +

Pensions Edit

Investment Amount: £239,691.57 Risk Category: Balanced (High End)

Target Fund: Vanguard LifeStrategy 60% Equity A Shares ...

Synaptic

Term:

Filter Results by Provider:

Filter Results by Product:

Sort Results by Value: