

Risk Illustrations - Advanced Options

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The screenshot shows a financial planning tool interface. On the left, the 'Illustration Settings' panel is visible, containing fields for investment details. In the center, a 'Chart' tab displays a bar chart showing values over 10 years. On the right, the 'Compare Alternate Outcomes' panel is shown with various toggle options. Three callout boxes provide detailed instructions for each of these sections.

Illustration Settings

Change the Investment Details and Portfolio here. Once updated, you will need to click 'Update' above the chart for it to take effect.

This will change the Illustrations original input

View the Outcome Chart, Efficient Frontier, Portfolio and Probability information within these tabs

Sustainable Drawdown

Set a Retirement Age, Term, Total Solution Cost and Target Income Per Annum and you will see fund longevity & gender-neutral Life Expectancy in the chart

Compare Alternative Outcomes

Create an alternative outcome by toggling Inflation, No Fees, What If scenarios, Drawdown and Solve contributions on or off

Only one Alternative Outcome option will be displayed in the outcome screen at one time.

The screenshot displays a financial planning tool interface. At the top, a legend indicates: Forecast Mean Return (green), Forecast Min. Return (red), Forecast Max. Return (blue), and Net Money In (blue). Below this, the main heading reads "Outcome projection forecast by each year of the investment term".

The interface is divided into several sections:

- Left Panel:** Contains input fields for "Regular Withdrawal £" (set to £300), "Frequency of Withdrawal" (Monthly), "Indexation Rate for Withdrawal" (Retail Price Index (RPI) 11.8%), and "Indexation Rate %" (11.80%). Below this is a "Costs & Charges" section with a "Specify Charges" toggle (checked), "Reduction in Yield (R.Y.)" (0.00%), and "Platform / Product Charges" (Platform Charge %: 0.40%, Product Charge %: 0.20%).
- Center Panel:** Features an "Outcome Summary" box with data: "Total Contributions During Term: £262,567.70", "Expected Outcome (Mean Gain): £255,067.29 or 27.53%", "Lowest Outcome (Min. Gain 5% Charge): £158,888.00 or -20.55%", and "Highest Outcome: £370,067.00". To its right is an "Alternate Outcome" box with a "Create an Alternate Scenario to review outcome" button and a small illustration of a landscape with a sun and cacti.
- Right Panel:** Includes "Retirement Term" (19), "Total Solution Cost %" (0.00%), "Target Income Per Annum" (60), and a "Show" button. Below these are expandable sections for "Solve Contributions" and "What If Scenario".

Four callout boxes provide further explanation:

- Costs & Charges:** Amend Platform/Product charges, Portfolio Charges and Adviser fees here.
- Outcome Summary:** Outcome Summary results will appear here.
- Alternate Outcome:** Alternative Outcome results will appear here.
- Solve Contributions:** Calculate how much your client would need to invest initially or on a regular basis to hit the Target Amount.
- What If Scenario:** Explore how a 'What If' scenario compares against the current Illustration.