

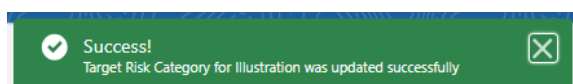
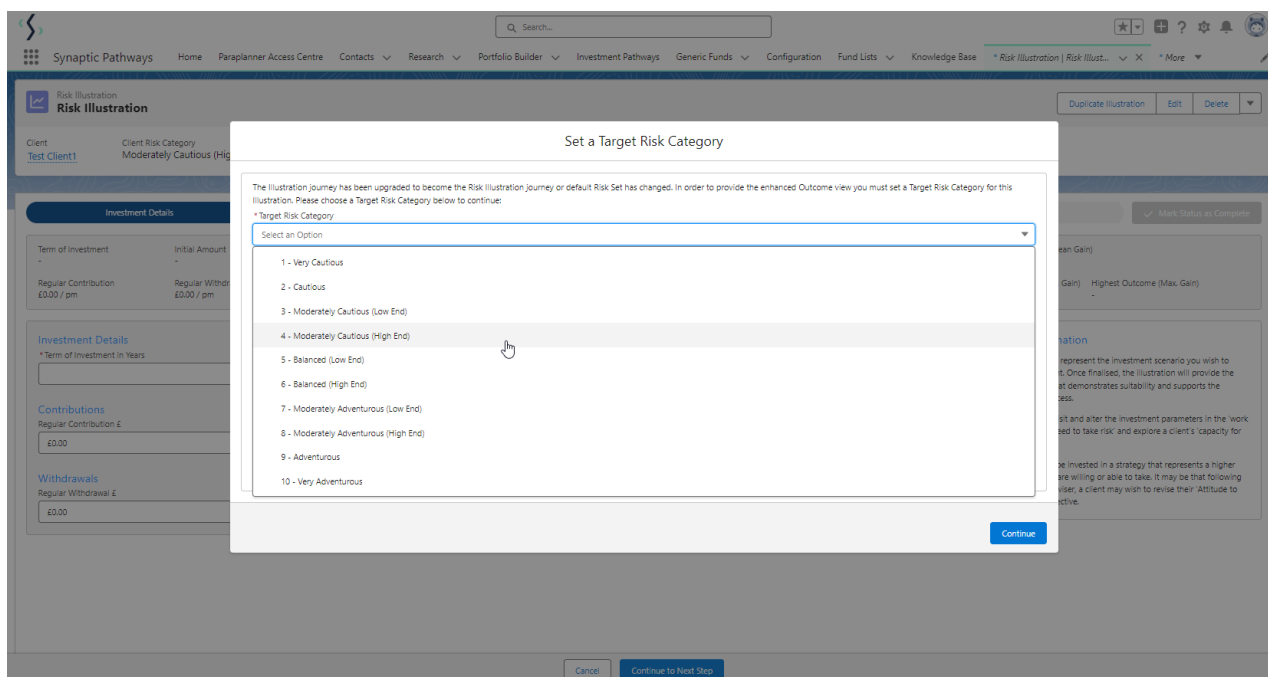
Risk Illustrations - Investment Details

Last Modified on 13/02/2024 3:35 pm GMT

This article is a continuation of - [Illustrations - Creating an Illustration](#)

Once the Illustration has been created, you can start to complete details of the scenario.

Start by selecting the Target Risk Category:



Complete the Investment details screen:

(These can be revisited later on in the journey)

Risk Illustration

Client: Test Client1 | Client Risk Category: Moderately Cautious (High End) | Created Date: 28/09/2023, 10:43

Investment Details | Pathway Selection | Charges & Fees | Outcome | Report

Term of Investment: 10 Years | Initial Amount: £200,000.00 | Regular Contribution: £200.00 / pm | Regular Withdrawal: £500.00 / pa

Growth Basis: Without Inflation | Rebalanced Annually: Yes | Total Solution Cost: 0.00% | Potential First Year Loss: -

Investment Risk Category: - | Objective Risk Category: Moderately Cautious (High End) | Investment Scenario Pathway: -

Expected Outcome (Mean Gain): - | Lowest Outcome (Min. Gain): - | Highest Outcome (Max. Gain): -

Investment Details

* Term of Investment in Years: 10 | * Initial Amount: £: £200,000.00

Contributions

Regular Contribution £: £200.00 | Frequency of Contribution: Monthly | Indexation Rate for Contribution: None | Indexation Rate %: 0.00%

Withdrawals

Regular Withdrawal £: £500.00 | Frequency of Withdrawal: Annually | Indexation Rate for Withdrawal: None | Indexation Rate %: 0.00%

Additional Information

The illustration should represent the investment scenario you wish to explore with your client. Once finalised the illustration will provide the investment forecast that demonstrates suitability and supports the financial planning process.

You will be able to revisit and alter the investment parameters in the 'work area' to explore the 'need to take risk' and explore a client's capacity for loss.

A client should never be invested in a strategy that represents a higher level of risk than they are willing or able to take. It may be that following discussion with the adviser, a client may wish to revise their 'Attitude to Risk' for a specific objective.

Buttons: Cancel, Continue to Next Step

Once complete, 'Continue to Next Step' on the bottom of the screen. This will take you to Pathway Selection:

Buttons: Cancel, Continue to Next Step

Risk Illustration

Client: Test Client1 | Client Risk Category: Moderately Cautious (High End) | Created Date: 28/09/2023, 10:43

Pathway Selection | Charges & Fees | Outcome | Report

Term of Investment: 10 Years | Initial Amount: £200,000.00 | Regular Contribution: £200.00 / pm | Regular Withdrawal: £500.00 / pa

Growth Basis: Without Inflation | Rebalanced Annually: Yes | Total Solution Cost: 0.00% | Potential First Year Loss: -

Investment Risk Category: - | Objective Risk Category: Moderately Cautious (High End) | Investment Scenario Pathway: -

Expected Outcome (Mean Gain): - | Lowest Outcome (Min. Gain): - | Highest Outcome (Max. Gain): -

Either

Select Investment Pathway Fund or Portfolio

Fund Selection

Select a portfolio or an individual fund as the basis of the investment.

Search by: Portfolio, Fund

Only Return Parent

Search funds

Or

Use the Clients Default Attitude to Risk

Use Client's Default Risk Category: Disabled

Additional Information

Risk Explorer provides the full range of investment forecasts, allowing you to project on:

- Nominal - Investment returns basis only (net of charges or inflation)
- Nominal - Investment returns with costs and charges (net of adviser charges)
- Real - Investment returns with impact of inflation (net of charges)
- Real - Investment returns with costs, charges and inflation

Use this screen to capture the costs and charges relevant to your scenario, including costs is not mandatory (or leave as default of 0)

Buttons: Back, Continue to Next Step

For further information on the Pathway Selection screen, see article [Illustration - Pathway Selection](#).