Risk Illustrations - Investment Details

15/04/2025 4:08 pm BST

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:

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Success!	

Complete the Investment details screen:

(These can be revisited later on in the journey)

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Client Client Rak Category Greated Date <u>Test Client1</u> Moderately Cautious (High End) 28/09/2023, 10:43							
Investment Details	Pathway Selection	Charges & Fees	Outcome	Report ✓ Mark Status as Complete			
Term of Investment Initial Amount 10 Years 200,0000 Regular Contribution Regular Withdrawal £200,00 / pm £500,00 / pe	Growth Basis Without Inflation Rebalanced Annually Yes	Total Solution Cost 0.00% Potential First Year Loss -	Investment Risk Category Moderately Cautious (High End) Investment Scenario Rathway	Expected Outcome (Mean Gain) Lowest Outcome (Min, Gain) Highest Outcome (Max, Gain)			
Investment Details *Tem of Investment in Years 19 Contributions	* Initial Amount £ £200,000.00			Additional Information The illustration should represent the investment scenario you with to epolore with your client. Once finalised, the illustration will provide the Investment forecast that demonstrates suitability and supports the financial paramit process.			
Regular Contribution £ Frequency of C £200.00 Monthly	ontribution	Indexation Rate for Contribution	Indexation Rate %	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			
Withdrawals Frequency of V Regular Withdrawal £ Frequency of V £500.00 Annually	Vithdrawai 👻	Indexation Rate for Withdrawal	Indexation Rate % C.00%	A clent should never be invested in a strategy that represents a night level of risk that 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.			
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Once complete, 'Continue to Next Step' on the bottom of the screen. This will take you to Pathway Selection:

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Either Select Investment Pathway Fund or Portfolio Fund Selection Gets aportfolio an Individual fund as the basis of the Investment. Search by Portfolo Fund Only Return Parent Q Search funds	Or Use the Clients Default Attitut Use Client's Default Risk Category		Additional Information Risk Equirer 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 (ret of adview charges) • Real - Investment returns with inspact of inflation (net of charges) • Real - Investment returns with costs, charges and inflation Use this screen to capture the costs and charges reteart to your scenario. Including costs is not manoatory (or leave as default of '0')
	Back Cor	tinue to Next Step	

For further information on the Pathway Selection screen, see article Illustration - Pathway Selection.