

Risk Illustrations - Advanced Options - Illustration Settings

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

Here you can change details of your illustration scenario for e.g. Investment details & Portfolio.

Please note: Changing anything in the Advanced Options tab > Illustration Settings will change your scenario. Use the 'What If' area to work through alternative solutions.

Illustration Settings

Investment Details

* Term of Investment in Years
10

* Initial Amount £
£200,000

Frequency of Contribution
Monthly

* Regular Amount £
£200

Indexation Rate for Contribution
Retail Price Index (RPI) 4.9%

Indexation Rate %
4.90%

Rebalance Annually Active

Allow for the Impact of Inflation Inactive

* Regular Withdrawal £
£500

Frequency of Withdrawal
Annually

Indexation Rate for Withdrawal
Retail Price Index (RPI) 4.9%

Indexation Rate %
4.90%

> Portfolio

In this example, I will change the term to 20 years. Click the 'Update' button to refresh the Illustration settings:

Illustration Settings

Investment Details

*Term of Investment in Years

*Initial Amount £

Frequency of Contribution

*Regular Amount £

Indexation Rate for Contribution

Indexation Rate %

Rebalance Annually Active

Allow for the Impact of Inflation Inactive

Once entered, you will need to click 'Update' to update the Illustration:

Results Capacity For Loss Suitability Compliance Details Report Content **Advanced Options**

Illustration Settings

Investment Details

*Term of investment in Years

*Initial Amount £

Frequency of Contribution

*Regular Amount £

Indexation Rate for Contribution

Indexation Rate %

Rebalance Annually Active

Allow for the Impact of Inflation Inactive

*Regular Withdrawal £

Frequency of Withdrawal

Indexation Rate for Withdrawal

Indexation Rate %

Use the option on this page to modify the parameters for the illustration and toggle the values you want to review on the graph. Update Revert

Chart Efficient Frontier Portfolio Probability

Target

Outcome projection forecast by each year of the investment term

Legend: Forecast Mean Return, Forecast Min. Return, Forecast Max. Return, Net Money In, Contributions, Withdrawals

Compare Alternate Outcomes

Quick Toggles
 With Inflation No Fees

Advanced Options
 What If Drawdown Solve

Term Matrix
 Explore the impact of term and risk using the target illustration as the reference.
 Select an alternative Term

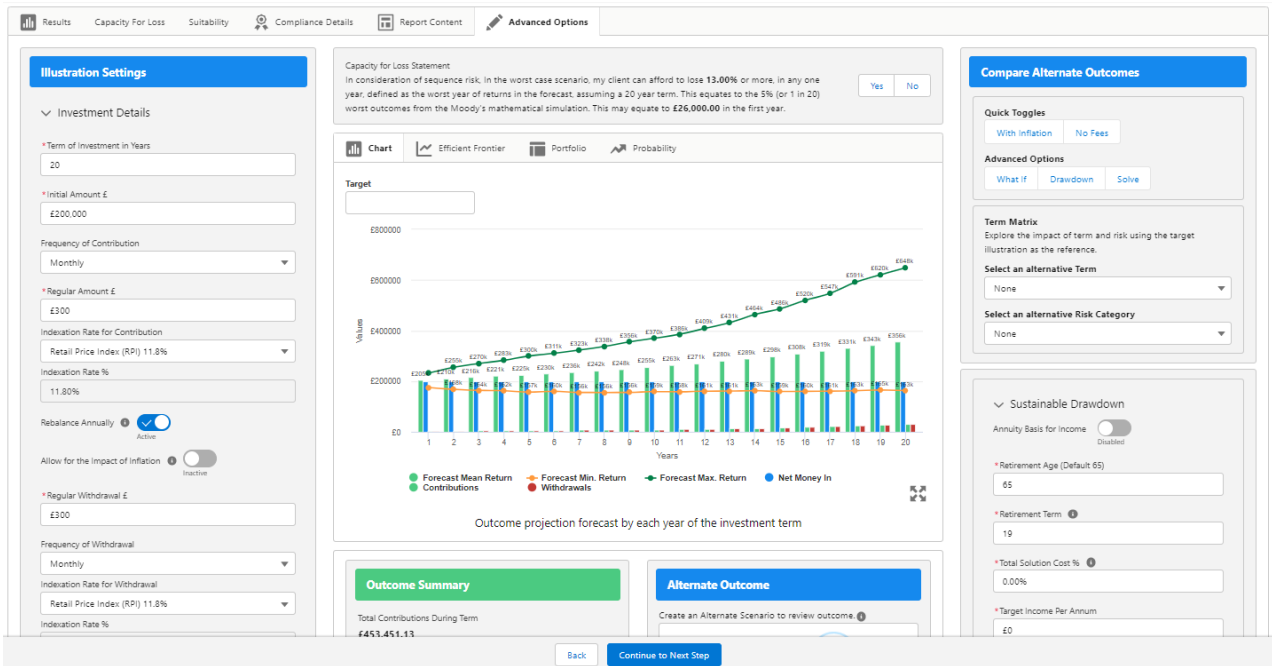
Select an alternative Risk Category

Outcome Summary: Total Contributions During Term (£212,507.70)

Alternate Outcome: Create an Alternate Scenario to review outcome.

Back Continue to Next Step

The chart & figures have now updated to reflect a 20 year term:



Change the portfolio used in the illustration by clicking 'Change'

Illustration Settings

> Investment Details

▼ **Portfolio**

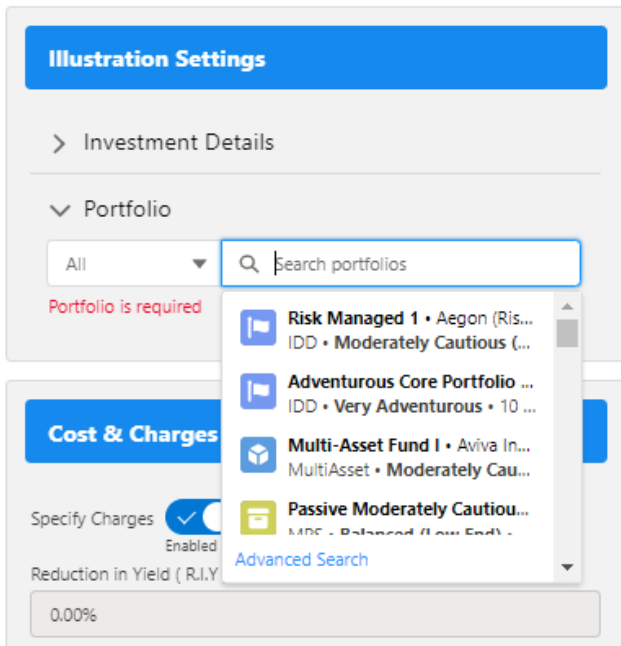
Target Portfolio
SAM Clever MPS 4
 MPS | Moderately Cautious (High End) - 4 of 10 | Strategic

Change

Portfolio Risk Measures

Min. Gain	Mean Gain	Max. Gain
-12.32%	3.03%	17.86%

Search for the portfolio you would like to use on this Illustration:



View the details of the new Portfolio and if you are happy to proceed, select 'Update'

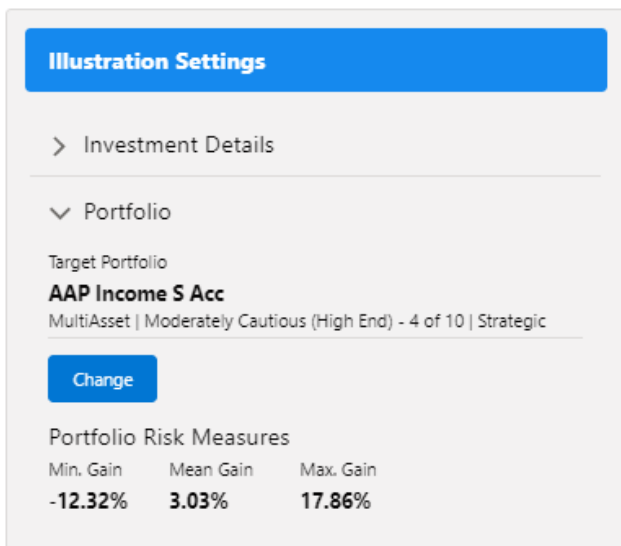


Illustration Settings

> Investment Details

> Portfolio

Target Portfolio
AAP Balanced C Acc
 MultiAsset | Balanced (High End) - 6 of 10 | Strategic

Change

Portfolio Risk Measures

Min. Gain Mean Gain Max. Gain
 -13.00% 4.03% 20.01%

Cost & Charges

Specify Charges Enabled

Reduction in Yield (R.I.Y)

0.00%

> Platform / Product Charges

Platform Charge %

0.40%

Product Charge %

0.20%

> Portfolio Charges

> Advisor Fees

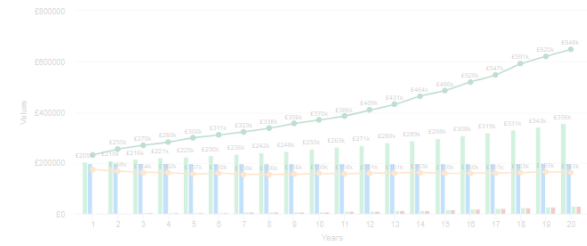
Use the option on this page to modify the parameters for the illustration and toggle the values you want to review on the graph

Update

Revert

Chart Efficient Frontier Portfolio Probability

Target



Outcome projection forecast by each year of the investment term

Outcome Summary

Total Contributions During Term
 £453,451.13

Alternate Outcome

Create an Alternate Scenario to review outcome.

Compare Alternate Outcomes

Quick Toggles

With Inflation No Fees

Advanced Options

What If Drawdown Solve

Term Matrix

Explore the impact of term and risk using the target illustration as the reference.

Select an alternative Term

None

Select an alternative Risk Category

None

> Sustainable Drawdown

Annuity Basis for Income Disabled

* Retirement Age (Default 65)

65

* Retirement Term

19

* Total Solution Cost %

0.00%

* Target Income Per Annum

£0

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Continue to Next Step