

Ex-Post Reviews - How to create a review

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

Ex-post reviews can be conducted either from a new holding (including generic) or a holding that has been converted from ex-ante research. For more information on how to create a comparison with ex-ante or ex-ante research, see [here](#).

Navigate to the holding you would like to review:

The screenshot shows the Synaptic Pathways interface for contact Ms. Susanna West. The 'Holdings' tab is active, displaying two categories of holdings:

- Off-Platform Holdings (2):**

Name	Reference	Current Value
Personal Pension Fully Insured		£147,367.86
Royal London Pension		£440,999.60
- Platform Holdings (1):**

Name	Provider Name	Contract Reference	Current Value
Aviva Wrap	Aviva Wrap UK Ltd		£56,736.00

Recent items and activity sections are also visible on the right side of the interface.

<https://synapticpathwaysuat.lightning.force.com/lightning/r/a0W4G00000MHZaeUAP/view>

The screenshot shows the detailed view of the 'Personal Pension | Fully Insured' holding. Key information includes:

- Client:** Susanna West
- Current Value:** £147,367.86
- Current Risk Rating:** 2 | Moderately Cautious

The 'Details' tab is active, showing the following information:

- Name:** Personal Pension | Fully Insured
- Description:** Test Description for Quilter Pension
- Provider Name:** Quilter
- Type (Basis) Name:** Personal Pension (Fully Insured)
- Product Name:** Personal Pension
- Status:** In force
- Contract Reference:** JY701GHX
- Valuation Type:**
- Start Date:** 07/11/2019
- End Date:** 04/11/2033
- Remaining Term:** 10
- Review Date:** 07/11/2024
- Rolling Term Basis:**
- Last Modified Date:** 30/11/2023, 12:43
- Surrender/Transfer Value:** 254,000.00

Two donut charts are displayed on the right:

- Weighting By Class Allocation:**
 - 31.89% - Global Equities (ex UK)
 - 18.92% - US Fixed Income
 - 16.39% - Global Bonds (ex UK)
 - 15.46% - European Fixed Income
 - 7.22% - UK Equities
 - 4.69% - UK Govt Bonds
 - 3.36% - Emerging Markets Equities
 - 1.44% - UK Corporate Bonds
 - 0.63% - Cash
- Weighting By Funds:**
 - 56.47% - Vanguard LifeStrategy 20% Equity UCITS ETF Dis
 - 29.94% - Vanguard LifeStrategy 60% Equity A Shares Acc
 - 13.59% - Vanguard

Below the details, there are sections for 'Contributions (1)' and 'Withdrawals (1)'. The contributions table shows one record:

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date
C-000170	Regular	Monthly	£200.00	None		09/11/2023

Click into the **Reviews** tab:

The screenshot shows the 'Personal Pension | Fully Insured' holding page. The 'Reviews' tab is selected, displaying a table with the following data:

Name	Description
Personal Pension Fully Insured	Test Description for Quilter Pension

Provider Name	Type (Basis) Name	Product Name
Quilter	Personal Pension (Fully Insured)	Personal Pension

Status	Contract Reference	Valuation Type
In force	JY701GHX	

Start Date	End Date
07/11/2019	04/11/2033

Remaining Term	Review Date
10	07/11/2024

Rolling Term Basis	Last Modified Date
	30/11/2023, 12:43

Surrender/Transfer Value
254,000.00

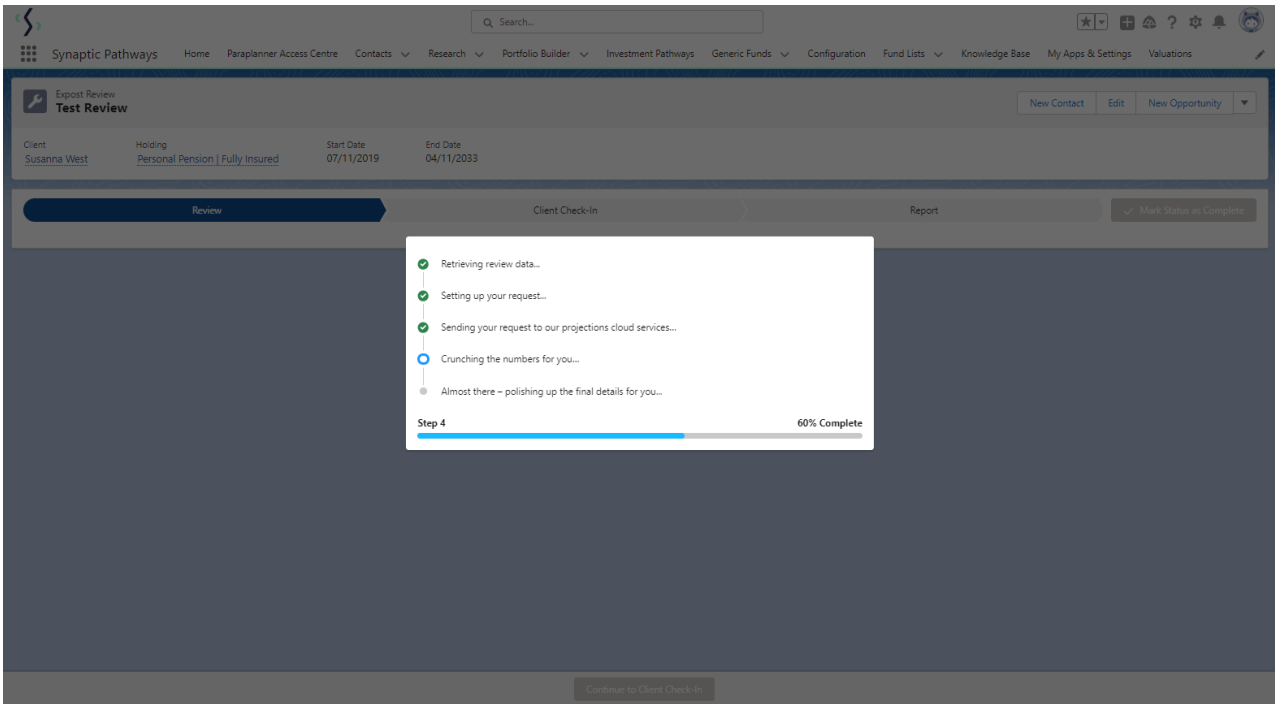
Click **New** to create a review

The screenshot shows the 'Personal Pension | Fully Insured' holding page with the 'Reviews' tab selected. The 'Expost Reviews (0)' section is visible, and a 'New' button is highlighted. To the right, a 'Weighting By Class Allocation' donut chart is displayed with the following data:

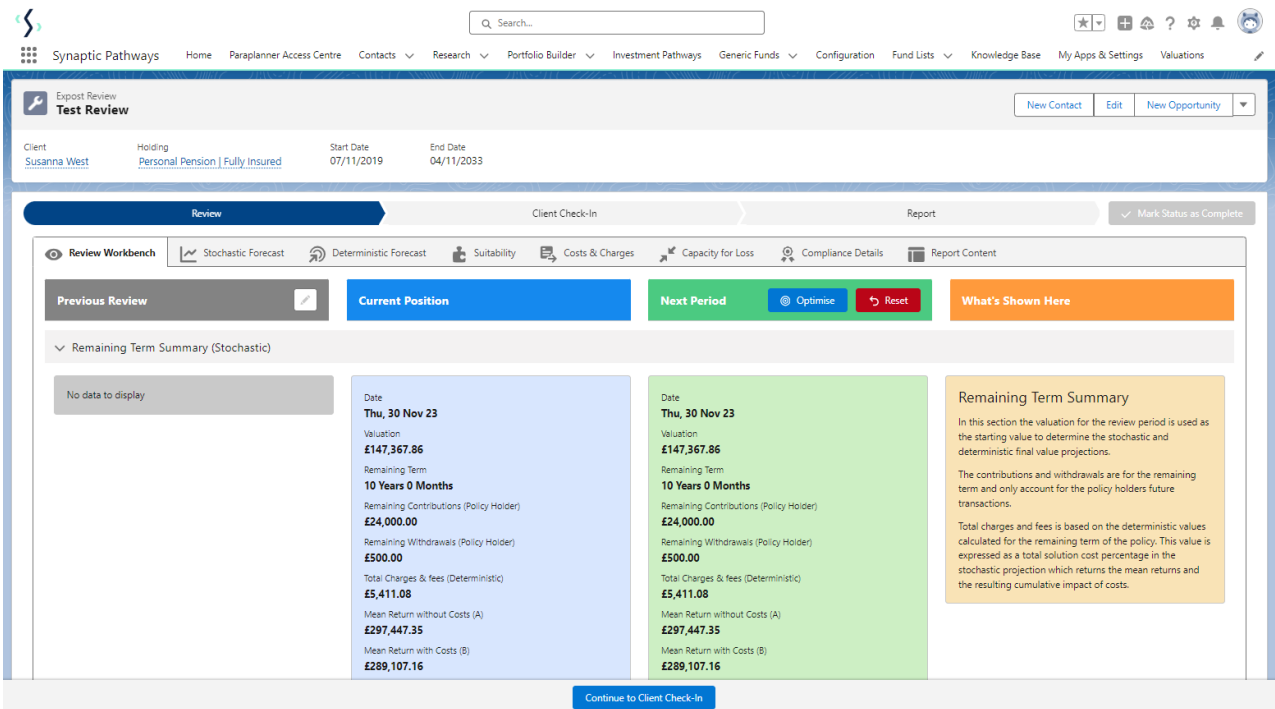
Class	Allocation
Global Equities (ex UK)	31.89%
US Fixed Income	18.92%
Global Bonds (ex UK)	16.39%
European Fixed Income	15.46%
UK Equities	7.22%
UK Govt Bonds	4.69%
Emerging Markets Equities	3.36%
UK Corporate Bonds	1.44%
Cash	0.63%

Enter a Review name and **Continue**:

The screenshot shows the 'Review Holding' dialog box. The 'Ex-post Name' field contains the text 'Test Review'. The 'Continue' button is highlighted.



This will take you to the review screen:



For further information on Ex-Post Reviews, see article [Ex-Post Reviews - Review Screen](#)