Ex-Post Reviews - Report Content

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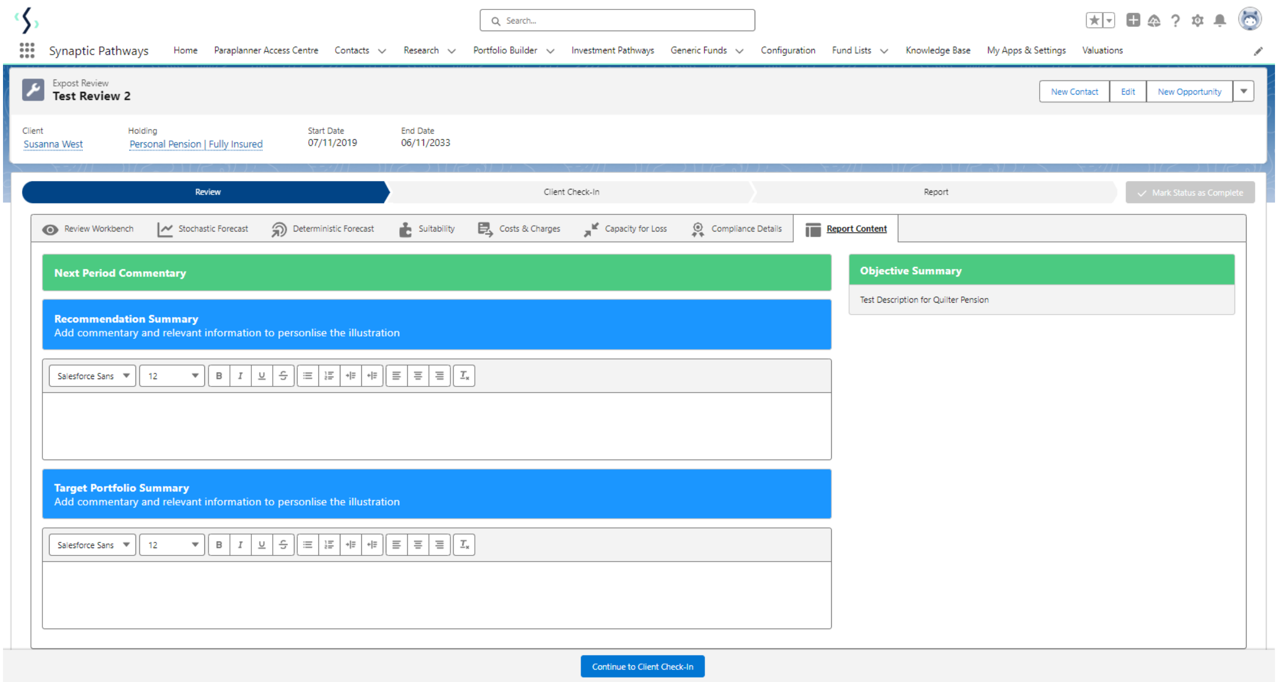
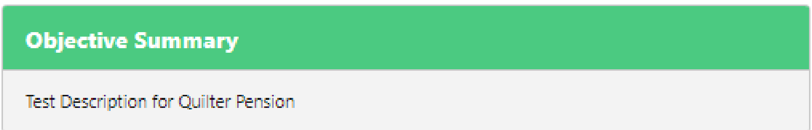
This article is a continuation of Ex-Post Reviews - Compliance Details

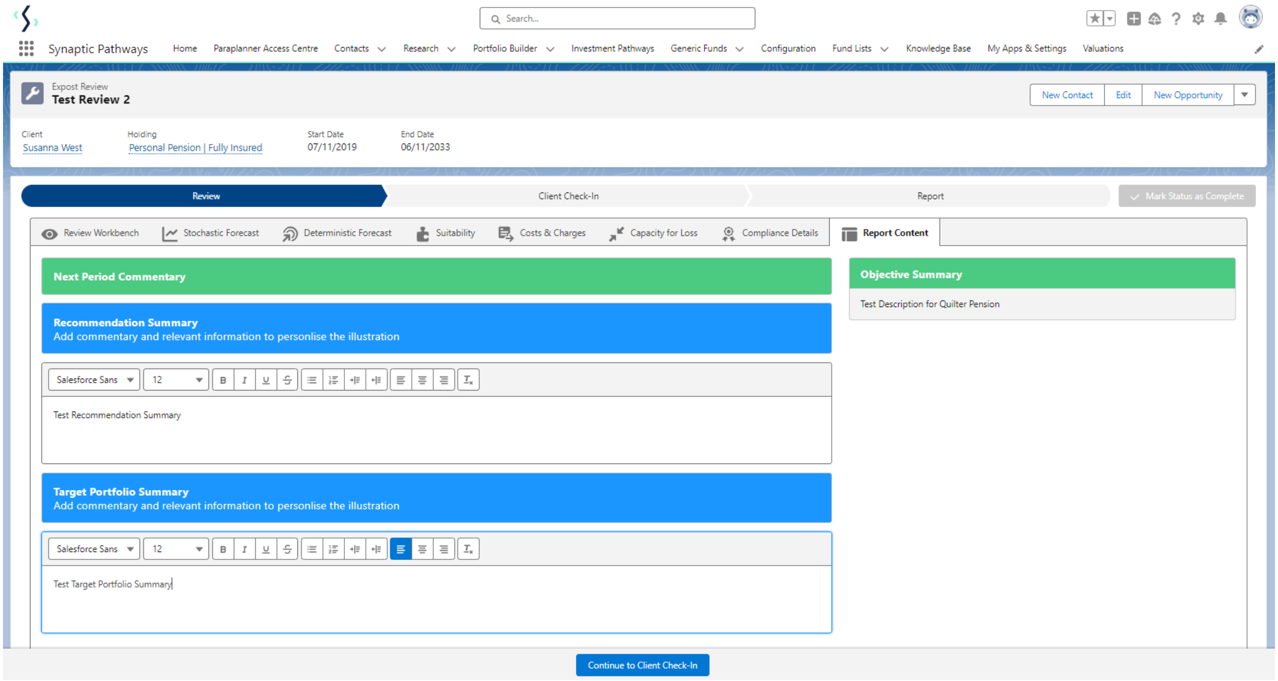
The **Report Content** contains a **Recommendation Summary** and **Target Portfolio Summary.** When completed, they will appear on the report.



The **Objective Summary** will pull through from the text entered in the Research>Add Investment screen.



Report Content is the last tab to review.



Continue onto the **Client Check-In** screen: