

Ex-Post Reviews - Optimise - Contributions & Withdrawals

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

Contributions & Withdrawals

In the Contributions & Withdrawals tab you are able to:

- Add or Edit Contributions
- Add or Edit Withdrawals

Existing Contributions and Withdrawals will be listed. You can either edit existing contributions, delete or add new.

In this example, we will edit an existing regular contribution:

Edit	Amount	Type	Frequency	Indexation	Indexat...	Start Date	End Date	Remove
	£200.00	Regular	Monthly	None		09/11/2023	03/11/2023	

Change the amount and **Save**

*Amount: 250
*Type: Regular
*Frequency: Monthly
*Indexation: None
*Start Date: 9 Nov 2023
*End Date: 3 Nov 2023

Move onto the Costs & Charges tab

Next Period Optimisation

Investment Details | Contributions & Withdrawals | Costs & Charges | Optimise Portfolio | Assets Under Management

Costs & Charges

Add contributions or withdrawals to model the impact on the outcome of the process.
Please note that the holdings contributions and withdrawals section will only be updated when the review is marked as complete.

+ Add Contributions

Edit	Amount	Type	Frequency	Indexation	Indexat...	Start Date	End Date	Remove
	£250.00	Regular	Monthly	None		09/11/2023	09/11/2033	

+ Add Withdrawals

Edit	Amount	Type	Frequency	Indexat...	Indexat...	Start Date	End Date	Remove
	£500.00	Single	Single			14/08/2025		

Cancel Save & Update