

Risk Illustrations - Advanced Options

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The screenshot shows a software interface for risk illustrations. It includes several panels: 'Illustration Settings' on the left, a central 'Chart' area with an 'Efficient Frontier' view, and 'Compare Alternate Outcomes' on the right. Callout boxes provide instructions for each section.

Illustration Settings

Change the Investment Details and Portfolio here. Once updated, you will need to click 'Update' above the chart for it to take effect.

This will change the Illustrations original input

View the Outcome Chart, Efficient Frontier, Portfolio and Probability information within these tabs

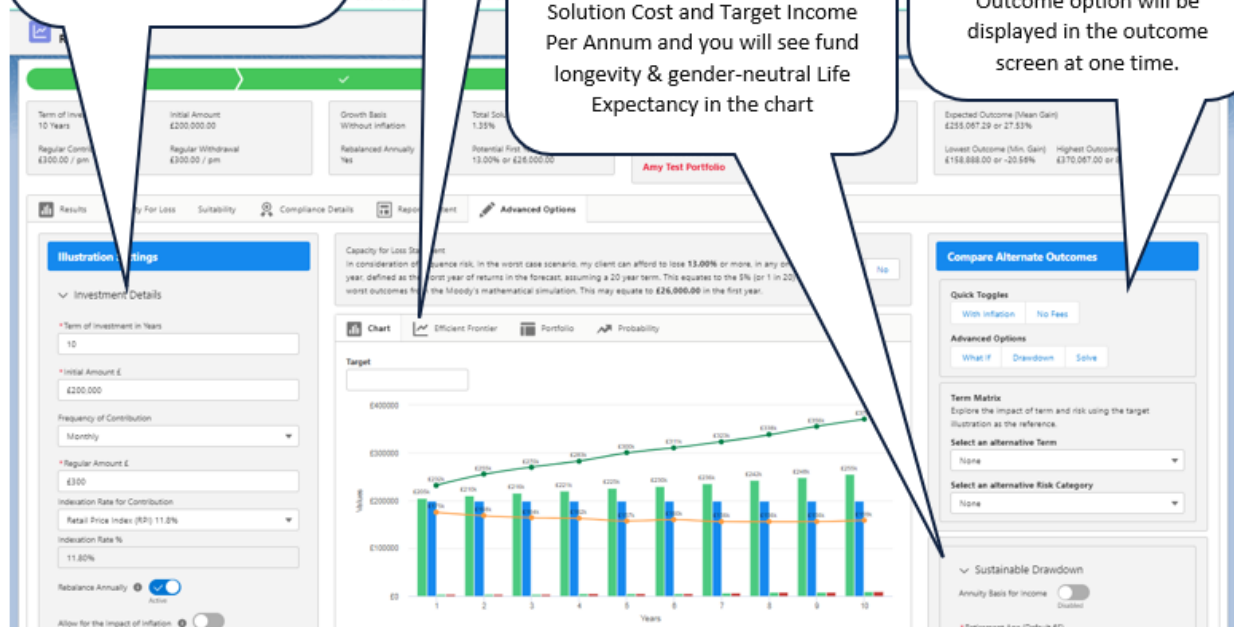
Sustainable Drawdown

Set a Retirement Age, Term, Total Solution Cost and Target Income Per Annum and you will see fund longevity & gender-neutral Life Expectancy in the chart

Compare Alternative Outcomes

Create an alternative outcome by toggling Inflation, No Fees, What If scenarios, Drawdown and Solve contributions on or off

Only one Alternative Outcome option will be displayed in the outcome screen at one time.



The screenshot displays a financial planning tool interface. At the top, a legend indicates: Forecast Mean Return (green), Forecast Min. Return (red), Forecast Max. Return (blue), and Net Money In (blue). Below this is the title "Outcome projection forecast by each year of the investment term".

Costs & Charges: This section on the left includes fields for "Regular Withdrawal £" (set to £300), "Frequency of Withdrawal" (Monthly), "Indexation Rate for Withdrawal" (Retail Price Index (RPI) 11.8%), and "Indexation Rate %" (11.80%). It also has expandable sections for "Platform / Product Charges", "Portfolio Charges", and "Advisor Fees".

Outcome Summary: A central panel showing "Total Contributions During Term £262,567.70", "Expected Outcome (Mean Gain) £255,067.29 or 27.53%", "Lowest Outcome (Min. Gain 5% Change) £158,888.00 or -20.55%", and "Highest Outcome £370,067.00".

Alternate Outcome: A panel with a "Create an Alternate Scenario to review outcome" button and a small illustration of a landscape with a sun and cacti.

Right Panel: Contains fields for "Retirement Term" (19), "Total Solution Cost %" (0.00%), "Target Income Per Annum" (60), and a selected portfolio "Amy Test Portfolio Model Portfolio - Balanced (Low End)".

Callout Boxes:

- Costs & Charges:** Amend Platform/Product charges, Portfolio Charges and Adviser fees here
- Outcome Summary:** Outcome Summary results will appear here
- Alternate Outcome:** Alternative Outcome results will appear here
- Solve Contributions:** Calculate how much your client would need to invest initially or on a regular basis to hit the Target Amount.
- What If Scenario:** Explore how a 'What If' scenario compares against the current Illustration