

Comparison & Ex-Ante - Research Screen

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In the example below, we have added a **Pension** as an investment. If you are unsure of how to add investments, see article [Comparison with Ex-Ante - Add Investment](#) for details.

The screenshot displays the Synaptic Pathways Research interface. The main title is "Susanna Comparison w/ Ex-ante". The client is "Susanna West". The description is "Test Description Text". The illustration type is "Whole of Market". The segment name and policy type are blank.

The interface includes a search bar, navigation menu, and a "Convert to Holding" button. The main content area is divided into sections: "Investments", "Trades", "Fees", and "AUM". The "Investments" section shows an "Add Investment +" button and a list of investments. One investment is highlighted: "Pensions" with an investment amount of £239,691.57 and a risk category of "Balanced (High End)". The target fund is "Vanguard LifeStrategy 60% Equity A Shares...".

The "Platforms" section shows a list of investment platforms with their respective metrics:

Platform	Growth	Final Value	Total Fees	RfLY
P1 Investment Management The P1 SIPP	3.84%	£342,701.68	£38,031.15	1.16%
James Hay Partnership Modular iSIPP	3.78%	£340,972.15	£39,760.68	1.22%
Raymond James Investment Services Ltd AJ Bell Investcentre SIPP	3.78%	£340,971.36	£39,761.47	1.22%
Fidelity Adviser Solutions				

Multiple investments can be added through the **Add Investment +** button.

As you add investments, the list of platforms will update to display investments available. At the bottom of the page there will be a platform & off platform combination.

In the example below, we have added **Pensions** and **Individual Savings Account**. The platforms listed show Pensions and ISAs included:

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Search...

Susanna Comparison w/ Ex-ante

Client: Susanna West Description: Test Description Text Illustration Type: Whole of Market Segment Name: Policy Type:

Research Review Client Check-in Report

Investments Trades Fees AUM

Add Investment +

Pensions Edit
Investment Amount: £239,691.57 Risk Category: Balanced (High End)
Target Fund: Vanguard LifeStrategy 60% Equity A Shares Acc

Individual Savings Accounts Edit
Investment Amount: £22,620.00 Risk Category: Balanced (High End)
Target Fund: Vanguard LifeStrategy 40% Equity A Shares Acc

37 of 37 Results

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
PLATFORM	P1 Investment Management The P1 SIPP • P1 ISA	3.84%	£373,243.65	£40,595.43	1.16%
JAMES HAY PARTNERSHIP	James Hay Partnership Modular ISPP • Modular Stocks & Shares ISA	3.78%	£371,337.17	£42,501.90	1.22%
Fidelity	Fidelity Adviser Solutions Fidelity Personal Pension • Fidelity (No Investor Fee)	3.78%	£371,269.31	£42,569.76	1.22%
Fidelity	Fidelity Adviser Solutions Fidelity (No Investor Fee) • Fidelity Personal Pension	3.78%	£371,269.31	£42,569.76	1.22%
Standard Life	Elevate Elevate Pension Investment Account • Elevate Stocks & Shares ISA - Explicit	3.77%	£370,938.43	£42,900.64	1.23%

Cancel Continue to Ex-ante Illustration

Lowest R.I.Y Platform and Off Platform Combination will be displayed at the bottom of the list:

Lowest R.I.Y Platform and Off Platform Combination 1 of 1 Results

Lowest R.I.Y Combination	AJ Bell (Investcentre) • AJ Bell (Investcentre)	Growth 3.49%	Final Value £374,743.57	Total Fees £39,095.50	R.I.Y 1.13%
AJBell Investcentre	AJ Bell (Investcentre) AJ Bell Investcentre Investment ISA	Growth 3.12%	Final Value £28,904.64	Total Fees £4,201.60	R.I.Y 1.88%
AJBell Investcentre	AJ Bell (Investcentre) AJ Bell Investcentre SIPP	Growth 3.94%	Final Value £345,838.94	Total Fees £34,893.90	R.I.Y 1.06%

Growth, Final Value, Total Fees and R.I.Y are displayed next to each result:

Platforms 37 of 37 Results

PLATFORM	P1 Investment Management The P1 SIPP • P1 ISA	Growth 3.84%	Final Value £373,243.65	Total Fees £40,595.43	R.I.Y 1.16%
JAMES HAY PARTNERSHIP	James Hay Partnership Modular ISPP • Modular Stocks & Shares ISA	Growth 3.78%	Final Value £371,337.17	Total Fees £42,501.90	R.I.Y 1.22%
Fidelity	Fidelity Adviser Solutions Fidelity Personal Pension • Fidelity (No Investor Fee)	Growth 3.78%	Final Value £371,269.31	Total Fees £42,569.76	R.I.Y 1.22%
Fidelity	Fidelity Adviser Solutions Fidelity (No Investor Fee) • Fidelity Personal Pension	Growth 3.78%	Final Value £371,269.31	Total Fees £42,569.76	R.I.Y 1.22%
Standard Life	Elevate Elevate Pension Investment Account • Elevate Stocks & Shares ISA - Explicit	Growth 3.77%	Final Value £370,938.43	Total Fees £42,900.64	R.I.Y 1.23%
Quilter	Quilter Collective Retirement Account • ISA	Growth 3.77%	Final Value £370,899.76	Total Fees £42,939.31	R.I.Y 1.23%
Quilter	Quilter ISA • Collective Retirement Account	Growth 3.77%	Final Value £370,899.76	Total Fees £42,939.31	R.I.Y 1.23%

