## Comparison & Ex-Ante - Trades

Last Modified on 10/10/2023 4:25 pm BST

Add switch information through the **Trades** tab.

Basanch Susanna Comparison w/ Ex-ante	777634115175388853406477		ASSOLIC <u>- 777</u> -28AD30	Z AAMMA JIIIDZ	71057111-7	////SAUC	Convert to Holding
Client Description Illustration Type Segm Susanna West Test Description Text Whole of Market	ient Name Policy Type						
Research	Review	Client Check-In	$\rangle$	Re	port		✓ Mark Status as Complete
Investments Trades Fees AUM	Term 10 Cr U	Change Segment	Stakeholder Pension Exclu	de Adviser Fees 3 S	Significant Figures		Report
Add Investment +	Filter Results by Provider	Filter Results by Product			Sort Results by Valu		
Pensions Edit	Filter one or more providers  V Platforms	Filter one or more produ	cts	•	Growth %	Final Value £	Charges £ RLY % 37 of 37 Results
Internet: Anous Ruc Cargory 223,6691-57 Balanced (High End) Taget And Vanguard UleStrategy 60% Equity A Shares Acc	PLATFORM	P1 Investment Management The P1 SIP+ P1 SA	Growth 3.84%	Final Value £373,243.65	Total Fees £40,595,43	R.LY 1.16%	+
Individual Savings Accounts     Edit		James Hay Partnership Modular (SIPP + Modular Stocks & Shares ISA	Growth 3.78%	Final Value £371,337.17	Total Fees £42,501.90	RLY 1.22%	+
Ris Cargoy 1222;82:000 Balanced High End) Tagat And Vanguard UfeStrategy 40% Equity A Shares Acc B Vanguard UfeStrategy 40% Equity A Shares Acc Vanguard UfeStrategy 40% Equity A Shares Acc	F	Fidelity Advicer Solutions Fidelity Personal Pension + Fidelity (No Investor Fee)	Growth 3.78%	Final Value £371,269.31	Total Fees £42,569.76	RLY 1.22%	+
	F	Fidelity Adviser Solutions Fidelity (No Investor Fee) + Fidelity Personal Pension	Growth 3.78%	Final Value £371,269.31	Total Fees £42,569.76	R.LY 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	RLY 1.23%	+
iavascriptvoid(0)		Cancel Continue to Ex-ante Illustration					
Investments Trades Fees AL Trades + Add Trades (Optionary) Provide a number of trades, the frequent balance to trade. Trades (Buy/Sell) 0	JM cy and percentage of th	re value					
Frequency of Trades							
Monthly		•					
% of Current Balance to Trade							
0.00%							
Value Balance is determined during the fl applied.	R.I.Y calculation when the	ne trade is					

The **Set Trades +** button will become available once information is complete. **Set Trades +** to apply to the Results:

			quency and percentage of the value
Trades (Buy/	Sell)		
4			
Frequency of Monthly			
% of Current 15.00%	Balance to Tr	ade	
Value Balano is applied.	ce is determi	ned during	the R.I.Y calculation when the trade

The button will be greyed out once applied.



The button will become available again if any changes are made.