

Basis of Illustration - Mark Wrapper as Reviewed


Last Modified on 12/10/2023 3:25 pm BST

Once all tabs have been reviewed and the Capacity for Loss statement has been completed, you can check the box next to the Investment:

Review

Select a wrapper to review the results, complete the capacity for loss statement and add commentary for compliance and reporting.

Mark as reviewed by selecting the checkbox for each item.

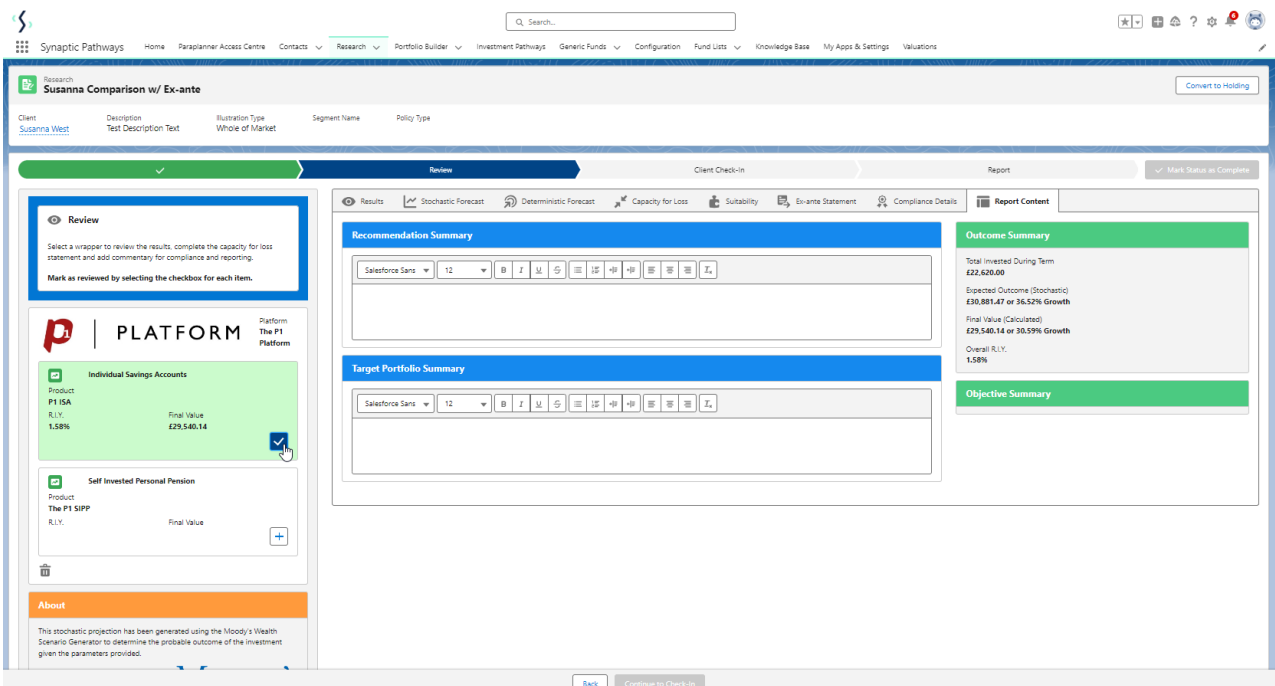
 **PLATFORM** Platform The P1 Platform

Individual Savings Accounts

Product: P1 ISA
R.I.Y.: 1.58%
Final Value: £29,540.14

Self Invested Personal Pension

Product: The P1 SIPP
R.I.Y.:
Final Value:



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 West

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


Review

Client Check-in Report Mark Status as Complete

Review

Select a wrapper to review the results, complete the capacity for loss statement and add commentary for compliance and reporting.

Mark as reviewed by selecting the checkbox for each item.

 **PLATFORM** Platform The P1 Platform

Individual Savings Accounts

Product: P1 ISA
R.I.Y.: 1.58%
Final Value: £29,540.14

Self Invested Personal Pension

Product: The P1 SIPP
R.I.Y.:
Final Value:

Recommendation Summary

Salesforce Sans 12 B I J M S P H R E T X

Target Portfolio Summary

Salesforce Sans 12 B I J M S P H R E T X

Outcome Summary

Total Invested During Term: £22,620.00
Expected Outcome (Stochastic): £30,881.47 or 36.52% Growth
Final Value (Calculated): £29,540.14 or 33.59% Growth
Overall R.I.Y.: 1.58%

Objective Summary

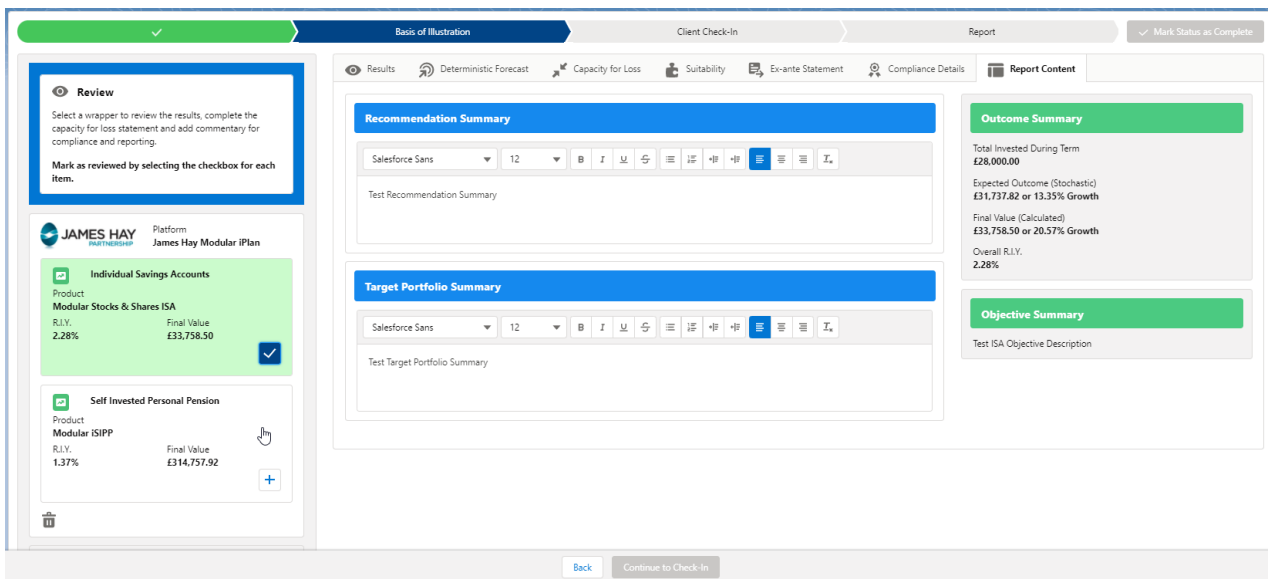
About

This stochastic projection has been generated using the Moody's Wealth Scenario Generator to determine the probable outcome of the investment given the parameters provided.

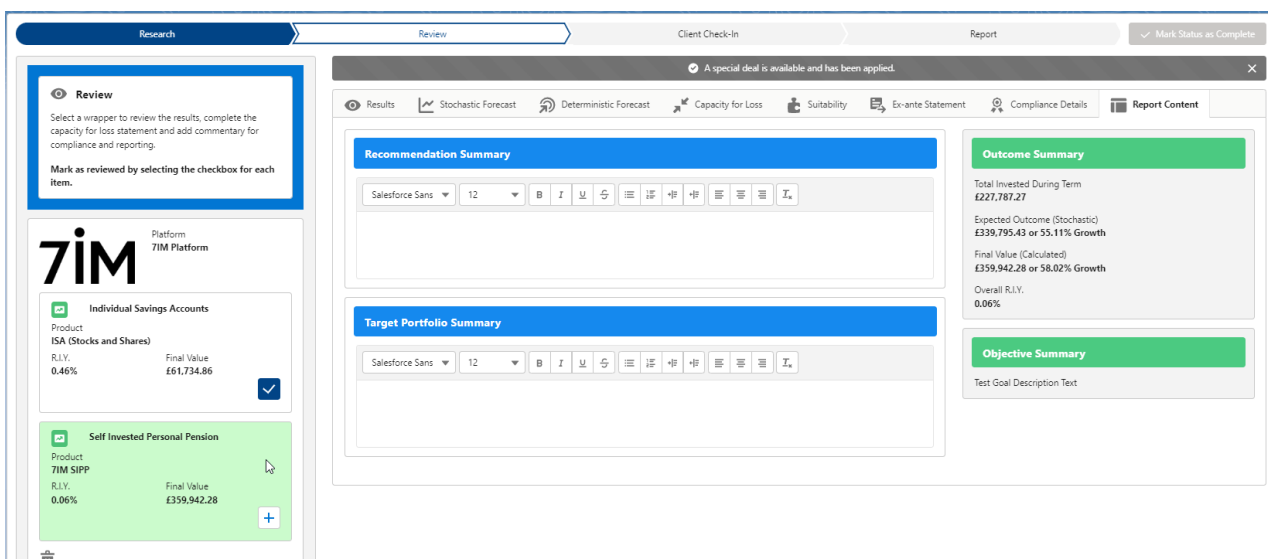
Back Continue to Check-in

If this is the only investment, you can proceed to the Check-In stage.

If you have multiple investments, you will need to review each investment separately:




Repeat the review process, completing the Capacity for Loss statement before marking as reviewed.




Review

Select a wrapper to review the results, complete the capacity for loss statement and add commentary for compliance and reporting.

Mark as reviewed by selecting the checkbox for each item.




Platform
7IM Platform

 **Individual Savings Accounts**


Product
ISA (Stocks and Shares)

R.I.Y.	Final Value
0.46%	£61,734.86

 **Self Invested Personal Pension**

Product
7IM SIPP

R.I.Y.	Final Value
0.06%	£359,942.28



All investments have been reviewed, proceed to the **Check-in** screen.

[Back](#) [Continue to Check-In](#)

See article [Client Check-in](#).
