Comparison & Ex-Ante using a CIP - Trades

Last Modified on 16/10/2023 12:22 pm BST

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

Value Balance is determined during the R.I.Y calculation when the trade is

applied.

Research Susanna Comparison w/ Ex-ante				52 I.U 7777 C.S. W.		(7 - 7PWS+7FF	<i></i>	Convert to Holding
Client Description Illustration Type Segme Susanna West Test Description Text Whole of Market	ant Name Policy Type							
Resarch Review			Client Check-In	Rej		Report	~ M	lark Status as Complete
Investments Trades Fees AUM	Term	pdate Results	Change Segment	Stakeholder Pension Ex	clude Adviser Fees	3 Significant Figures		📰 Report
Add Investment +	Filter Results by Provider		Filter Results by Product			Sort Results by V		
Pensions Edit	Filter one or more providers	*	Filter one or more products			Growth %	Final Value £ Cha	arges £ RLY%
Investment Amount Risk Category £239,691.57 Balanced (High End) Target Fund	✓ Platforms							37 of 37 Results
Vanguard LifeStrategy 60% Equity A Shares Acc	P PLATFORM	P1 Investment Management The P1 SIPP + P1 ISA		Growth 3.84%	Final Value £373,243.65	Total Fees £40,595.43	R.LY 1.16%	+
Individual Savings Accounts		James Hay Partnership		Growth	Final Value	Total Fees	RLY	+
Investment Amount Risk Category	PARTNERSHIP	Modular ISIPP • Modular Stocks & Shares ISA		3.78%	£371,337.17	£42,501.90	1.22%	
£22,620.00 Balanced (High End) Targer Fund Vanguard LifeStrategy 40% Equity A Shares Acc	Fidelity Adviser Solutions Fidelity Fursion Fidelity (No Investor Fee)		Growth 3.78%	Final Value £371,269.31	Total Fees £42,569.76	RLIY 1.22%	+	
Synaptic	Synaptic Fidelity Advices Solutions Fidelity Personal Persion				Final Value £371,269.31	Total Fees £42,569.76	RLY 1.22%	+
		Elevate		Growth	Final Value	Total Fees	RLY	+
	Standard Life	Elevate Pension Investment Account • Elevate Stock	s & Shares ISA - Explicit	3.77%	£370.938.43	£42,900.64	1.23%	
javascript.void(0)		Cancel Continue to Ex-ante	Illustration					
Investments Trades Fees AU	JM							
Trades								
+ Add Trades (Optional)								
Provide a number of trades, the frequence balance to trade.	cy and percentage of th	he value						
Trades (Buy/Sell)								
0								
Frequency of Trades								
Monthly		-						
% of Current Balance to Trade								
0.00%								

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

Provide a nu balance to t		des, the fre	quency and percentage of the value
Trades (Buy/S	Sell)		
4			
Monthly % of Current	Balance to Tr	ade	•
15.00%			
Value Balano is applied.	ce is determi	ned during	g the R.I.Y calculation when the trade

The button will be greyed out once applied.



Any changes to the information will make the button available again.