

# Basis of Illustration - Mark Wrapper as Reviewed - CIP

Last Modified on 16/10/2023 3:08 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  
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

Susanna Comparison w/ Ex-ante

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

Review

Client Check-in Report Mark Status as Complete

**Review**

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**Individual Savings Accounts**

Product: P1 ISA  
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**Self Invested Personal Pension**

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Final Value:

**Recommendation Summary**

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

**Target Portfolio Summary**

Salesforce Sans 12 B I J L S M P H R E F 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 30.59% Growth  
Overall R.I.Y.: 1.58%

**Objective Summary**

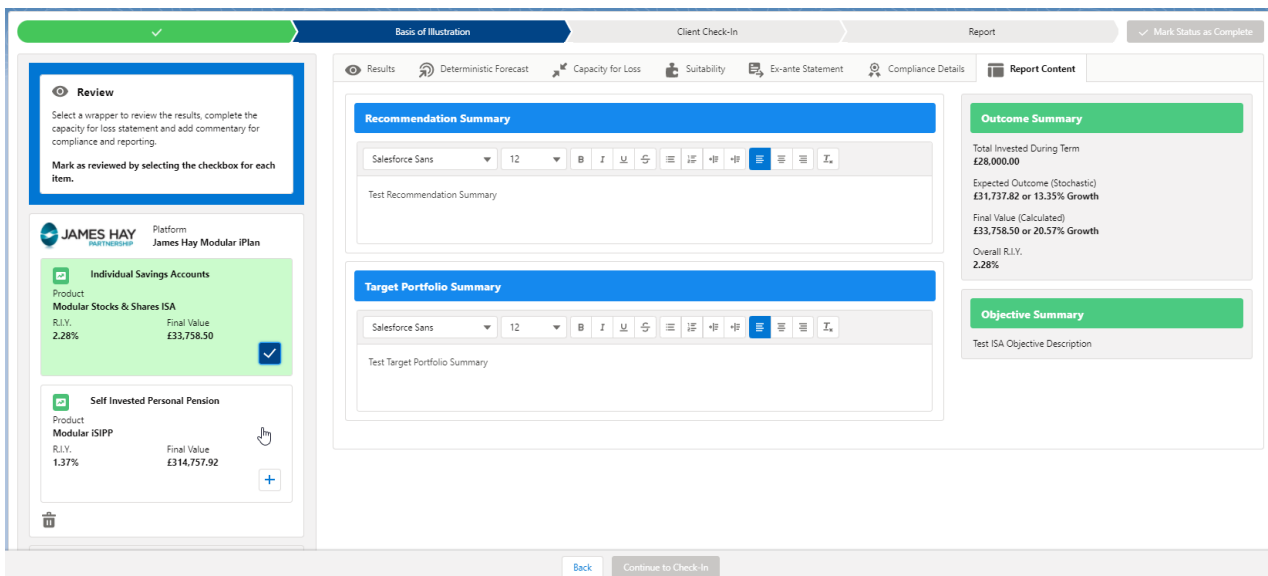
About

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.

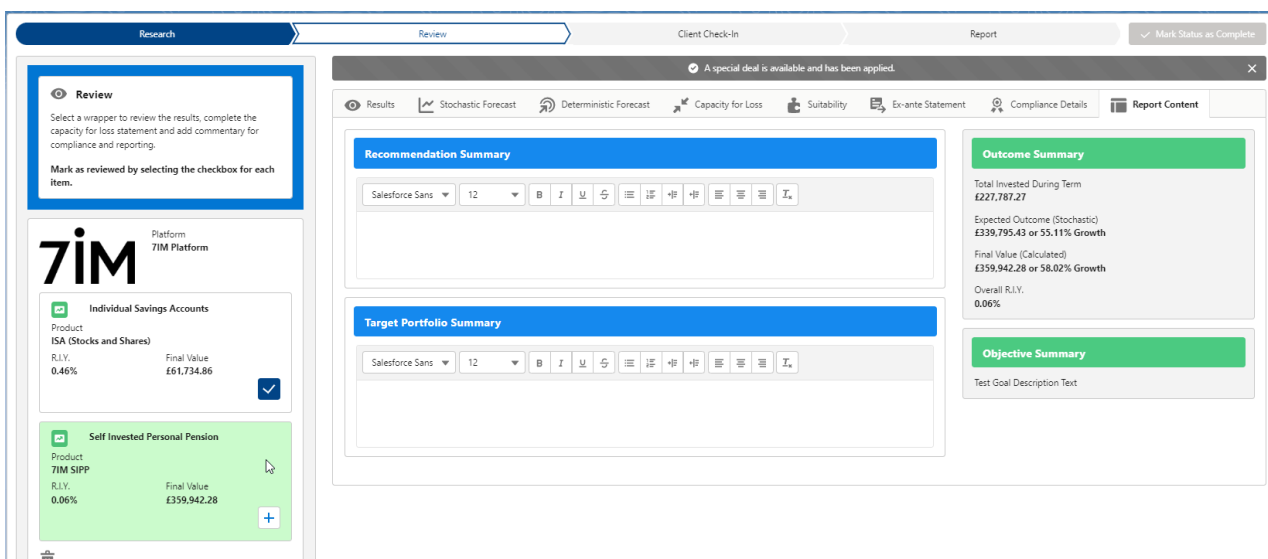
Back Continue to Check-in

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.

# 7IM

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.

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See article [Client Check-in](#)

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