

Ex-Ante - Editing Investment Details

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Edit wrapper Investment details through the **Edit** button:

The screenshot displays a user interface for managing investments. At the top, there is a blue navigation bar with the word "Research" and a right-pointing arrow. Below this, a tabbed interface shows "Investments" as the active tab, with "Switches/Trades" and "Fees" as alternative tabs. A blue button labeled "Add Investment +" is positioned at the top left of the main content area. The central focus is a card for a "Self Invested Personal Pension". This card includes an "Edit" button with a hand cursor icon, indicating it is clickable. Below the title, the card lists the following details: "Investment Amount" is £223,786.75; "Risk Category" is Moderately Cau...; and "Target Fund" is Royal London UK All Share Tracker Z ... At the bottom of the card, there is a trash can icon on the left and a blue checkmark icon on the right. The Synaptic Software logo, featuring a colorful brain icon and the text "SYNAPTIC SOFTWARE", is located at the bottom center of the interface.

All ▾
Q Search...
✕

Choose Wrapper Type & Investment Details

Investment Segment, Wrapper & Risk Category
Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type
Self Invested Personal Pension ▾

* Choose Target Risk Category
4 - Moderately Cautious (High End) ▾

* Objectives & Needs
Growth ▾

* Ability to Bear Losses
No Capital Guarantee ▾

Product Selection

Quilter
Self Invested Personal Pension • Collective Retirement Account
✕

Investment Details

Objective / Goal description
Test Goal Description Text

* Initial Amount £
£200,000

Transfer In Amount £
£0

Contributions

Regular Contribution £
£200

Frequency of Contribution
Monthly ▾

Indexation Rate for Contribution
Retail Price Index (RPI) 4.9% ▾

Indexation Rate %
4.90%

Cancel Save

Make changes and **Save**

All ▾
Q Search...
✕

Choose Wrapper Type & Investment Details

Investment Segment, Wrapper & Risk Category
Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type
Self Invested Personal Pension ▾

* Choose Target Risk Category
4 - Moderately Cautious (High End) ▾

* Objectives & Needs
Growth ▾

* Ability to Bear Losses
No Capital Guarantee ▾

Product Selection

Quilter
Self Invested Personal Pension • Collective Retirement Account
✕

Investment Details

Objective / Goal description
Test Goal Description Text

* Initial Amount £
210000

Transfer In Amount £
£0

Contributions

Regular Contribution £
£200

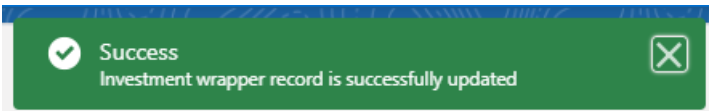
Frequency of Contribution
Monthly ▾

Indexation Rate for Contribution
Retail Price Index (RPI) 4.9% ▾

Indexation Rate %
4.90%

Cancel Save

Once saved, the results will recalculate:



A screenshot of the Synaptic Pathways software interface. The top navigation bar includes "Synaptic Pathways" and various menu items like "Home", "Contacts", "Research", "Portfolio Builder", "Investment Pathways", "Configuration", "Fund Lists", "Knowledge Base", "My Apps & Settings", "Valuations", and "Central Investment Propos...". A search bar is located in the top right. Below the navigation bar, a green success notification banner is visible, identical to the one above. The main content area is titled "Test Illustration Ex-ante Apr22" and features a "Convert to Holding" button. The interface is divided into several sections: "Client" (Client Text), "Description" (Test Description Text), "Illustration Type" (Whole of Market), and "Segment Name". Below these are tabs for "Research", "Review", "Client Check-in", and "Report". The "Research" tab is active, showing an "Investments" section with a "Self Invested Personal Pension" card. The card displays "Investment Amount: £219,012.34", "Risk Category: Moderately Cautio...", and "Target Fund: Royal London UK All Share Tracker Z Acc". To the right of the card are filters for "Term" (10), "Filter Results by Provider", "Filter Results by Product", and "Sort Results by Value" (Growth %, Final Value £, Charges £, RLY %). A "Report" button is also present. At the bottom of the interface, there are "Cancel" and "Continue to Ex-ante Illustration" buttons.