Ex-Ante - Research Screen

In the example below, we have added a **Self Investment Personal Pension** as an investment. If you are unsure of how to add investments, see article Ex-Ante - Add Investment for details.

Synaptic Pathways Home Contacts V Res	Q Search earch Portfolio Builder Investment Pathways Configu	uration Fund Lists ∽ Knowledge Base My Apps & Settin	gs Valuations *Central Investment Propes V X
Research Test Illustration Ex-ante Apr22	22-5 UULT - XXXXXX/IIII/ - 2XXX52 UU-27772-5 XXX		Convert to Holding
Client Description Illustration Type Client Test Test Description Text Whole of Ma			
Research Investments Switches/Trades Fees	Review	Client Check-In	Report VMark Status as Complete
Add Investment +	Term Update 10 C ^C Results	Change Stakeholder Pension Exc Segment	lude Adviser Fees 3 Significant Figures
Self Invested Personal Edit	Filter Results by Provider Filter one or more providers	Filter Results by Product Filter one or more products	Sort Results by Value Growth % Final Value £ Charges £ RLV %
Investment Amount Risk Category £219,012.34 Moderately Cau Target Fund	V Platforms		1 of 1 Results
Royal London UK All Share Tracker Z	Aegon Platform AJ Bell Investcentre SIPP		nal Value Total Fees R.LY + 39,651.80 £11,143.95 0.35% +
Synaptic			
	Cancel	e to Ex−ante Illustration	

Review the details of your chosen Investment:

Review	Client Check-In	Report	✓ Mark Status as Complete
Term Update 10 C Results	Change Stakeholder Pens Segment	sion Exclude Adviser Fees 3 S	ignificant Figures
Filter Results by Provider Filter one or more providers	Filter Results by Product Filter one or more products	Sort Results by Value Growth % F	inal Value £ Charges £ RLY %
✓ Platforms			1 of 1 Results
Al Bell Investcentre SIPP			RLY 0.35% b
	Term Update 10 C Results Filter Results by Provider Filter one or more providers V Platforms	Term Update Change Stakeholder Per 10 C Results Segment Filter Results by Provider Filter Results by Provider Filter one or more providers V Platforms	Term Update 10 C Results Filter Results by Provider Segment Filter Results by Provider Filter neor more providers Filter one or more providers Filter one or more products Y Platforms

Growth, Final Value, Total Fees and R.I.Y are displayed next to each result:

✓ Platforms						1 of 1 Results
	Aegon Platform AJ Bell Investcentre SIPP	Growth 4.65%	Final Value £339,651.80	Total Fees £11,143.95	R.I.Y 0.35%	+