

# Ex-Post Reviews - How to create a review

Last Modified on 30/11/2023 1:03 pm GMT

Ex-post reviews can be conducted either from a new holding (including generic) or a holding that has been converted from ex-ante research. For more information on how to create a comparison with ex-ante or ex-ante research, see [here](#).

Navigate to the holding you would like to review:

The screenshot shows the Synaptic Pathways interface for contact Ms. Susanna West. The 'Holdings' tab is active, displaying two categories: 'Off-Platform Holdings (2)' and 'Platform Holdings (1)'. The 'Off-Platform Holdings' table lists 'Personal Pension | Fully Insured' with a current value of £147,367.86 and 'Royal London Pension' with a current value of £440,999.60. The 'Platform Holdings' table lists 'Aviva Wrap' with a current value of £56,736.00. On the right, the 'Recent Items (3)' section shows 'Test Questionnaire' and 'Attitude to Risk Questionnaire Manual'. The 'Activity' section is currently empty.

<https://synapticpathwaysuat.lightning.force.com/lightning/r/a0W4G00000MHZaeUAP/view>

The screenshot shows the Synaptic Pathways interface for holding 'Personal Pension | Fully Insured'. The 'Details' tab is active, showing client information (Susanna West, £147,367.86, 2 | Moderately Cautious) and holding details (Name: Personal Pension | Fully Insured, Description: Test Description for Quilter Pension, Start Date: 07/11/2019, End Date: 04/11/2033). The 'Weighting By Class Allocation' chart shows: Global Equities (ex UK) 31.89%, US Fixed Income 18.92%, Global Bonds (ex UK) 16.39%, European Fixed Income 15.46%, UK Equities 7.22%, UK Govt Bonds 4.69%, Emerging Markets Equities 3.36%, UK Corporate Bonds 1.44%, and Cash 0.63%. The 'Contributions (1)' table shows a regular monthly contribution of £200.00 starting on 09/11/2023.

Click into the **Reviews** tab:

The screenshot shows the 'Personal Pension | Fully Insured' holding page. At the top, it displays the client name 'Susanna West', current value '£147,367.86', and risk rating '2 | Moderately Cautious'. Below this is a navigation bar with tabs: Details, Underlying Assets, Cash Accounts, Assets, Performance, Settings, **Reviews**, and Transaction History. The 'Reviews' tab is active, showing a table with the following details:

Name	Description	
Personal Pension   Fully Insured	Test Description for Quilter Pension	
Provider Name	Type (Basis) Name	Product Name
Quilter	Personal Pension (Fully Insured)	Personal Pension
Status	Contract Reference	Valuation Type
In force	JY701GHX	

Additional review details are shown on the right:

Start Date	End Date
07/11/2019	04/11/2033
Remaining Term	Review Date
10	07/11/2024
Rolling Term Basis	Last Modified Date
	30/11/2023, 12:43
Surrender/Transfer Value	
254,000.00	

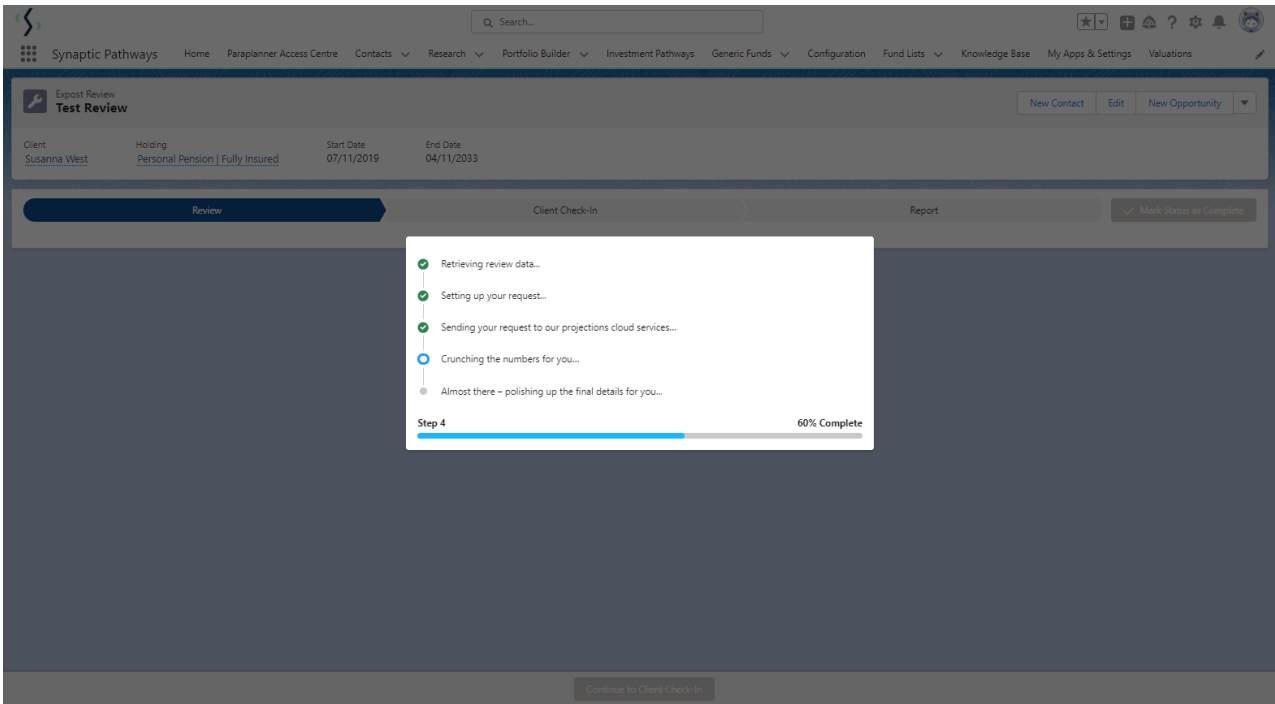
Click **New** to create a review

The screenshot shows the 'Personal Pension | Fully Insured' holding page with the 'Reviews' tab selected. The 'Expost Reviews (0)' section has a 'New' button. To the right, a 'Weighting By Class Allocation' donut chart is displayed with the following data:

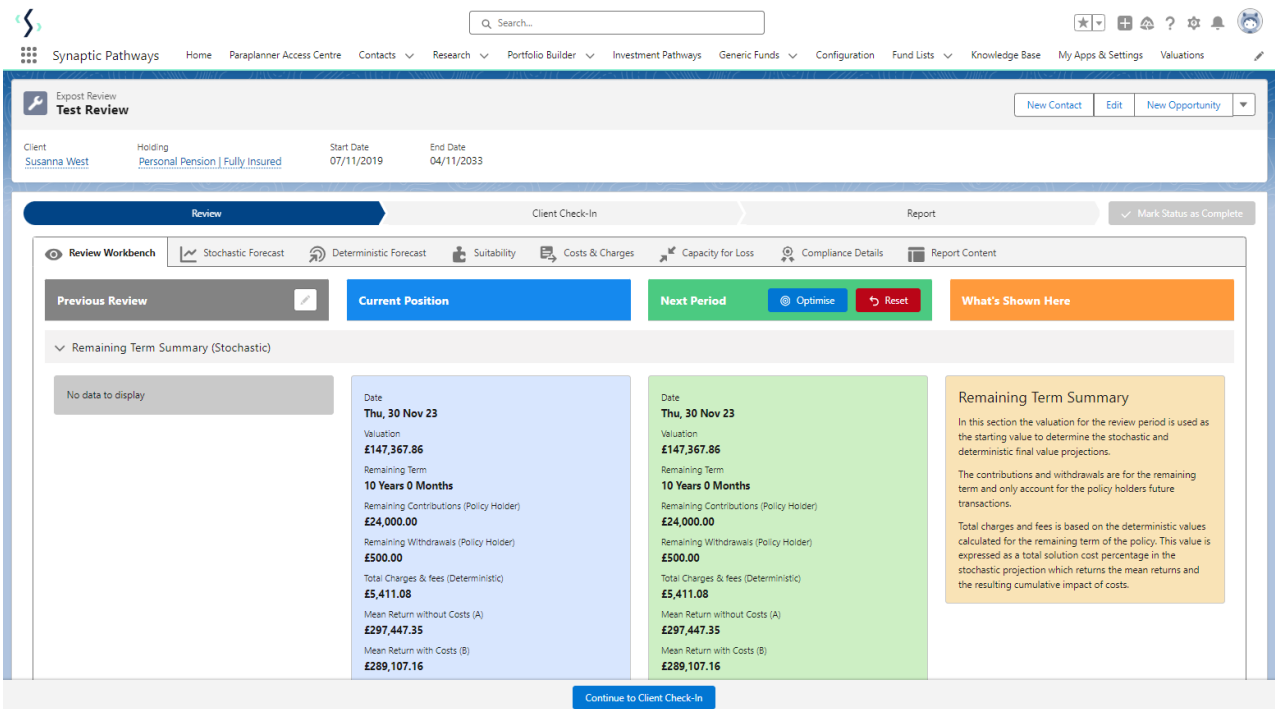
Class	Allocation
Global Equities (ex UK)	31.89%
US Fixed Income	18.92%
Global Bonds (ex UK)	16.39%
European Fixed Income	15.46%
UK Equities	7.22%
UK Govt Bonds	4.69%
Emerging Markets Equities	3.36%
UK Corporate Bonds	1.44%
Cash	0.63%

Enter a Review name and **Continue**:

The screenshot shows a 'Review Holding' dialog box. It has a title bar with a close button (X). The main content area contains the text '\* Ex-post Name' followed by a text input field containing 'Test Review'. At the bottom right, there is a blue 'Continue' button with a hand cursor over it.



This will take you to the review screen:



For further information on Ex-Post Reviews, see article [Ex-Post Reviews - Review Screen](#)