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:

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Contact Ms. Susanna West 🚠		MALE DINSTIC	//////////////////////////////////////			Contact New Opportunity
Title Account Name Phone (2) + 07555555		Contact Owner				
Personal retrieved (row, insules) Payal London Peribum Proyal London Peribum Proyal London Peribum Prove Peribum		Family AUM	Current Value £147.367.86 £440.999.60 Current Value	Nev (*) (*) Nev	Recent Items (3) Test Questionnaire Contact Test Client1 Attitude to Risk Questionnaire Manual Contact Susanna West Attitude to Risk Questionnaire Contact Susanna West Activity Chatter Cotact C	
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Client Current Value Current Risk		11	72mm/1/1			
Details Underlying Assets	Cash Accounts Assets Per	rformance Settings	Reviews Tr	ansaction History	Weighting By Class Allocation	31.89% - Global Equities
Name Personal Pension Fully Insured Provider Name Quilter Status In force	Description Test Description for Quilter Pension Type (Basis) Name Personal Pension (Fully Insured) Contract Reference JY701GHX	Product Name Personal Pension Valuation Type	Sart Date 07/11/2019 Remaining Term 10 Rolling Term Basis Surrender/Transfer Value 254,000.00	End Date 04/11/2033 Review Date 07/11/2024 Last Modified Date 30/11/2023, 12:43		(er. UK) ■ 18,92% - US Fixed Income ■ 16,99% - Global Bonds (er. UK) ■ 15,46% - European Fixed Income ■ 7,22% - UK Equities ■ 4,69% - UK Gort Bonds ■ 3,46% - Eurograng ■ 1,44% - UK Corporate Bonds ■ 0,63% - Cash
Contributions (1) Item • Updated 3 minutes ago Contribution Id Reg. G.000170 Reg. G.00017 G.0001		mount V Indexation	n V Indexation V	Image: start Date V Er 09/11/2023 03	Weighting By Funds	56.47% - Vanguard LifeStrategy 200% Equity
Withdrawals (1)	Vie	w All		\$ * C New		UCITS ETF Dis 29.94% - Vanguard LifeStrategy 60% Equity A Shares Acc 13.59% - Vanguard

Click into the **Reviews** tab:

usanna West		Risk Rating lerately Cautious			
Details	Underlying Assets	Cash Accounts Assets	Performance Settin	igs Reviews 1	Transaction History
Name		Description		Start Date 07/11/2019	End Date 04/11/2033
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Click **New** to create a review

Synaptic Pathways Home Paraplanner Access Centre Contacts V Research	Q Search_ A Portfolio Builder Investment Pathways Generic Funds Con	rifguration Fund Lists V Knowledge Base My Apps & Settings Valuations 🖌		
Personal Pension Fully Insured Edit Delete				
Client Current Value Current Risk Rating Susanna West £147,367.86 2 Moderately Cautious				
Details Underlying Assets Cash Accounts Assets Performant	nce Settings <u>Reviews</u> Transaction History	Weighting By Class Allocation		

Enter a Review name and **Continue:**

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Review Holding	
* Ex-post Name Test Review	
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Export Review Test Review Cient Hording Start Date	End Date	New Contact Edit New Opportunity 💌
Susanna West Personal Pension Fully Insured 07/11/2019 Review	04/11/2033 Client Check-In	Report V Mark Status as Complete
	 Retrieving review data Setting up your request Sending your request to our projections cloud services Crunching the numbers for you Almost there - polishing up the final details for you Step 4 60% Complete 	

This will take you to the review screen:

Synaptic Pathways Home Paraplanner Access Centre	Q. Search Contacts v Research v Portfolio Builder v Inves	stment Pathways Generic Funds v Configuration Fund Lists	Knowledge Base My Apps & Settings Valuations
Ciert Holding Start Susanna West Personal Pension Fully Insured 07/1	Date End Date 11/2019 04/11/2033		New Contact Edit New Opportunity 💌
Review Review Workbench	Client Check-In eministic Forecast 🔮 Suitability 📑 Costs & Charges Current Position	Report	: VMark-Status as Complete
No data to display	Date Thu, 30 Nov 23 Valuation £147,367,36 Bernahing Term 10 Years 0 Months Remaining Withdrawals (Policy Holder) £24,000.00 Total Charges & frees (Determinatic) £50,000 Total Charges & frees (Determinatic) £5,411.08 Mean Return without Costs (A) £297,447.35 Mean Return without Costs (B) £289,107.16	Date Thu, 30 Nov 23 Valuation £147,367,86 Remaining Term 10 Years O Months 10 Years O Months Remaining Contributions (Policy Holder) £20,000 Total Change & fees (Deterministic) £5,411.08 Mean Return with Costs (A) £297,447,35 Mean Return with Costs (B) £289,107,16	Remaining Term Summary In this section the valuation for the review period is used as the starting value to determine the stochastic and deterministic final value projections. The contributions and withdrawals are for the remaining term and only account for the policy holders future transactions. Total changes and fees is based on the deterministic values calculated for the remaining term of the policy. This value is expressed as a total solution cost percentage in the stochastic projection which returns the mean returns and the resulting cumulative impact of costs.

For further information on Ex-Post Reviews, see article Ex-Post Reviews - Review Screen