

Switching - Research Screen

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This article is a continuation of [Switching - Creating within a client record](#)

The screenshot displays the Synaptic Research interface for a 'Test Pension Switch' client record. The interface is divided into three main sections: Ceding Scheme (orange header), Target Scheme (blue header), and Outcome (green header). A search bar and navigation menu are visible at the top. A 'Mark Status as Complete' button is located in the top right corner of the main content area.

Ceding Scheme Section: Contains an 'Add Ceding Scheme' button and a card with instructions: 'To start, add a ceding scheme by selecting the Add Ceding Scheme action. When a valid scheme is present a scheme card will appear with a consolidated scheme card. As more schemes are added the consolidated scheme will update and the calculated information will be used as the basis to populate the target scheme and outcome calculations.'

Target Scheme Section: Contains an 'Add Target Scheme' button and a card with instructions: 'Add a ceding scheme first, using the Add Ceding Scheme action. When a valid ceding scheme is present the Add Target Scheme will become active.'

Outcome Section: Contains a card with an illustration of binoculars and text: 'Critical Yield, Hurdle Rate, Growth Rate and Report will be displayed here when a valid ceding and target scheme are present.'

Callouts: A callout box in the top left says 'Add one or more ceding schemes' pointing to the 'Add Ceding Scheme' button. A callout box in the middle says 'Once ceding schemes have been added, Add target scheme.' pointing to the 'Add Target Scheme' button.

The screenshot displays the Synaptic Pathways interface for a research opportunity. The interface is divided into several sections: Ceding Scheme, Target Scheme, Outcome, and Results. Callouts provide detailed information about each section.

Callouts:

- Consolidated scheme details:** Points to the Consolidated Scheme card in the Ceding Scheme section.
- Add Switches/Trades & Fees:** Points to the Switches/Trades and Fees tabs in the Target Scheme section.
- Target Scheme Investment details:** Points to the Target Scheme card in the Target Scheme section.
- Outcome details including RIY, Growth, Critical Yield and Hurdle Rate:** Points to the Switch Result card in the Outcome section.
- Edit Target Scheme:** Points to the edit icon on the Target Scheme card.
- Edit Scheme:** Points to the edit icon on the Consolidated Scheme card.
- Report:** Points to the Report button on the Switch Result card.
- Update Results:** Points to the Update Results button in the Results section.
- Ceding Schemes are listed individually:** Points to the list of individual ceding schemes (Aberdeen Asset Managers Limited and Quilter).
- Untick individual schemes and update the results:** Points to the checkboxes next to the individual ceding schemes.
- Platforms & Off Platform options will be listed in the results:** Points to the Platforms section in the Results area, showing Fidelity Adviser Solutions.
- Consolidated scheme details will be listed at the top of the results for comparison:** Points to the Consolidated Ceding Schemes summary card at the top of the Results section.
- Cheapest option automatically selected:** Points to the checkmark next to the Quilter scheme in the individual ceding schemes list.

Interface Data:

Ceding Scheme - Consolidated Scheme:

Current Value	Maturity Value
£77,651.00	£103,200.00
Growth Rate (Mid)	RLY
4.67%	1.85%

Target Scheme:

Product	Term
Comparison Basis	10Yrs 3Mos
Target Portfolio	Risk Category
Vanguard LifeStrategy 60% Equity A	Balanced (Low End)
Acc	

Outcome - Switch Result:

Critical Yield	Hurdle Rate
3.30%	-1.37%
Growth Rate (Mid)	RLY
4.67%	0.49%

Results - Consolidated Ceding Schemes:

Growth	Final Value	Total Fees	RLY
2.82%	£103,200.00	£20,697.37	1.85%

Results - Platforms:

Platform	Growth	Final Value	Total Fees	RLY
Fidelity Adviser Solutions	4.18%	£118,094.25	£5,878.11	0.49%

For further information on Switch research, see article [Switching - Add Ceding Scheme](#)