Switching - Add Target Scheme

Last Modified on 18/10/2023 11:38 am BST

This article is a continuation of Switching - Add Ceding Scheme

Add a Target Scheme through the + **Add Target Scheme** button:

Synaptic Pathways Home Paraplanner Access Centre C	Q. Search	· Valuations
Research Susan Switch Client Description Buttstoon Type Set Whole of Market Set	nert Name Rolly Spe Pensions	Est Deixa Get Ilustration
Ceding Scheme Consolidated Scheme Conert Value L232,300.00 L291,987.12 Grank Nate Mall L50% L223,8 LV 1.50% L223,8 LV L4 Add Coding Scheme	Result	Vide State at Complete
Acgon Platform Making Value 220600.00 2226555.1 Grown Rass (Ma) X.V 1.50% 2.03%	Add a triget scheme action.	Critical Yaid, Hurdle Sata, Growth Rate and Raport will be displayed here when a valid cading and target scheme are present.
Current Value Maturity Value 652,300,00 665,421.61 Growth Ray (Md) R.(V 1.50% 5,70%		

Choose a target product or leave blank for a comparison of available products. In this example we will leave the product blank.

Create Target Scheme				
What's Shown Here Choose the target product or leave blank for i include in summary report	a comparison of available products and select th	e target fund or portfolio to be use	d. Optionally set risk and MiFID compliance	e parameters to
Product Selection + Choose Product				
Alternate Product Enable this feature if the target product is not Include Alternate Product in Results	available as a published product using the add	product action above.		
* Product Name Insert Product Name	Initial Charge	Regular Annual Charge		
Fund Selection Search by Portfolio Fund Generic Fund]			
Needs & Risk Category	* Ability to Bear Losses		* Target Risk Category	
Select an Option	Select an Option	•	Select an Option	•
Investment Details Objective / Goal Details				
investment Details				
				Cancel

If the product selected is not available, Select Include Alternate Product in Results:

Alternate Product Enable this feature if the target product is not available as a published product using the add product action above. Include Alternate Product in Results				
* Product Name	Initial Charge	Regular Annual Charge		
Insert Product Name	% <u>£</u> 0.00%	% £ 0.00%		
Alternate Product Enable this feature if the target product is not a Include Alternate Product in Results	vailable as a published product using the add	i product action above.		
* Product Name Aviva Platform	Initial Charge	Regular Annual Charge		

Select either a **Portfolio, Fund** or **Generic Fund:**

Fund Selection	
Search by Portfolio Fund Generic Fund	
Only Return Parent Q. Search funds	

In this example, we will select a fund. Tick **Only Return Parent** if you would like the fund search to only return Parent funds.

Fund Selection		
Search by		
Portfolio Fund Generic Fund		
Only Return Parent		
Q, ACDQ		
Vanguard LifeStrategy 60% Equity A Shares Acc GB00B3TYHH97 • ACDQ • Vanguard Investments UK Limite		
* Objectives and Needs	* Ability to Bear Losses	* Target Risk Category
Select an Option	Select an Option	Select an Option

Tick the **Lock Share Class** button if you would like the exact fund selected to be used in the research. If left unselected, the system will find the cheapest share class available:

Fund Selection		
Search by Portfolio Fund Generic Fund		
Vanguard LifeStrategy 60% Equity A Shares Acc GB00B3TYHH97 • ACDQ • Vanguard Investments UK Limite	X Lock Share Class	
	Lock Share Class	
Needs & Risk Category		

Complete the Needs & Risk Category area:

Needs & Risk Category				
Objectives and Needs	Ability to Bear Losses		Target Risk Category	
Select an Option	Select an Option	•	Select an Option	•
Preservation				
Growth				
Income				
Hedged				
Leveraged Return				
Term of Investment In Years				
10Yrs 3Mos	 Use Ceding Scheme Term 			
Summary				
Total Initial Value	lotal of Contributions	Net Investment Over Term		
- 4	£0.00	£0.00		

Needs & Risk Category			
Objectives and Needs	Ability to Bear Losses	Target Risk Category	
Growth	 Select an Option 	Select an Option	•
	Limited Capital Loss		
nvestment Details	No Capital Guarantee		
Dbjective / Goal Details	Loss Beyond Capital		
Needs & Risk Category			/
	* Ability to Bear Losses	* Target Risk Category	/
	* Ability to Bear Losses	* Target Risk Category ✓ Select an Option	
*Objectives and Needs			
*Objectives and Needs Growth		Select an Option	
* Objectives and Needs		Select an Option Cautious Moderately Cautious Balanced	h
*Objectives and Needs Growth Investment Details		Select an Option Cautious Moderately Cautious	

Summary details are calculated using the Transfer Value in the ceding scheme/s details.

Use Ceding Scheme Term

Once complete, Save

Investment Details Term of Investment In Years

10Yrs 3Mos

	Create ⁻	Target Scheme	
Enable this feature if the target product is not	available as a published product using the add	product action above.	
Include Alternate Product in Results Disabled			
* Product Name Insert Product Name	Initial Charge	Regular Annual Charge % _£ 0.00%	
Fund Selection Search by Portfolio Fund Generic Fund Vanguard LifeStrategy 60% Equity GB00B3TYHH97 + ACDQ + Vanguard	A Shares Acc	Share Class	
Needs & Risk Category *Objectives and Needs Growth	* Ability to Bear Losses ▼ No Capital Guarantee	v	*Target Risk Category Balanced
Investment Details Objective / Goal Details			
Test Objective Details			
Investment Details Term of Investment In Years 10Yrs 3Mos	✓ Use Ceding Scheme Term		
Summary Total Initial Value £253,094.00	Total of Contributions £76,142.04	Net Investment Over Term £329,236.04	
			Cancel Save

This will populate the Target Scheme summary information at the top of the screen and will return a list of available products.

Synaptic Pathways Home Paraplanner Access Centre Contact	Q. Search.	🖈 🗉 🖨 ? 🕸 🦧 🧯
Besearch Susan Switch		Edit Delets Get illustration
Ceding Scheme	Target Scheme	Outcome
Consolidated Scheme Consolidated Scheme Xeta Xatury Volue X293,987.12 Grown Rate (Mel) X1V 1.50% Z.42:5 4.40 Cetting Scheme	Image: Scheme Fees Product Torm Family AUM Torm Statistics Basis 10Yrs 3Mos Torm Family AUM Torm Statistics Basis 10Yrs 3Mos Torm Torm Comparison Basis 10Yrs 3Mos Torm Rule Chargory Vanguard LifeStrategy 60% Equity A Shares Acc Balanced	Switch Result Crical Wald Hurds Ress -0.85% -2.35% Greent Rate (Md) R.17 1.50% 0.46%
Aegon Platform	Results Consolidated Ceding Schemes Projection of aggregated schemes for the purpose of comparison	Comparison Report (* Liptics Result) Growth Proj Valas Total Feat ELV -1.32% £511587.12 £57.834.77 2.421%
Advance by Embark Advance by Embark Current Yalua K5.2300.00 E55.421.61	Stakeholder Pension Stakeholder Pension Basic Pension Purposes	1 of 1 Results Growth Final Value Total Fess R.LY 0.01% £325558.43 £47,556.39 1.49%
Growth Rate (Md) R.LY 1.50% 5.70%	V Platforms P1 Investment Management Tra 5: 1999	Oreanin Frequition Total Frequition R.L.Y Oreanin Frequition Total Frequition R.L.Y LARM EREL622.22 EVES 723.99 0.46%
Synaptic	RAYMOND JAMES [®] Raymond James Investment Services Ltd AJ Bel Investeente 599	Growth Prai Value Total Fee: 8.1 Y Growth Prai Value Total Fee: 8.1 Y 0.99% £560,160,35 £16,956,66 0.31%