

Ex-Post Reviews - Compliance Details

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This article is a continuation of [Ex-Post Reviews - Capacity for Loss](#)

The **Compliance Details** tab includes an internal **Compliance Statement**, **Stochastic Investment Forecast Details by Year**, **Portfolio Factsheet** and **Risk Summary**.

Expost Review
Test Review 2

Client: Susanna West | Holding: Personal Pension | Fully Insured | Start Date: 07/11/2019 | End Date: 06/11/2033

Review | Client Check-in | Report | Mark Status as Complete

Review Workbench | Stochastic Forecast | Deterministic Forecast | Suitability | Costs & Charges | Capacity for Loss | **Compliance Details** | Report Content

Next Period Projection
Stochastic Projection with Changes for Next Period and Remainder of Term

Compliance Statement
Add content to the Compliance Statement to meet the regulatory requirements for the recommendation, this statement is for the internal use only and will not be displayed in the final report.
This is for internal purposes only.

Stochastic Investment Forecast Details by Year

Year	In	Out	Total In	Mean Gain	Net Growth
5	£149,767.86	£0.00	£149,767.86	£160,895.70	£11,127.84
6	£2,400.00	£500.00	£1,900.00	£172,866.22	£21,198.36
7	£2,400.00	£0.00	£1,900.00	£185,779.08	£31,711.22
8	£2,400.00	£0.00	£1,900.00	£198,346.57	£41,878.71
9	£2,400.00	£0.00	£1,900.00	£210,976.52	£52,108.66
10	£2,400.00	£0.00	£1,900.00	£224,492.14	£63,224.28
11	£2,400.00	£0.00	£1,900.00	£238,883.57	£75,215.71
12	£2,400.00	£0.00	£1,900.00	£254,861.29	£88,793.43
13	£2,400.00	£0.00	£1,900.00	£270,688.15	£102,220.29
14	£2,400.00	£0.00	£1,900.00	£288,718.18	£117,850.32

Table 1. Investment Return Forecast by remaining term with fees applied.

Portfolio Factsheet
Target Portfolio: **Test Review 2**
Moderately Cautious | 2 of 5

Risk Summary
Client Risk Profile: **Balanced** | 3 of 5
Illustration Risk Target: **Moderately Cautious** | 2 of 5

Continue to Client Check-in

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