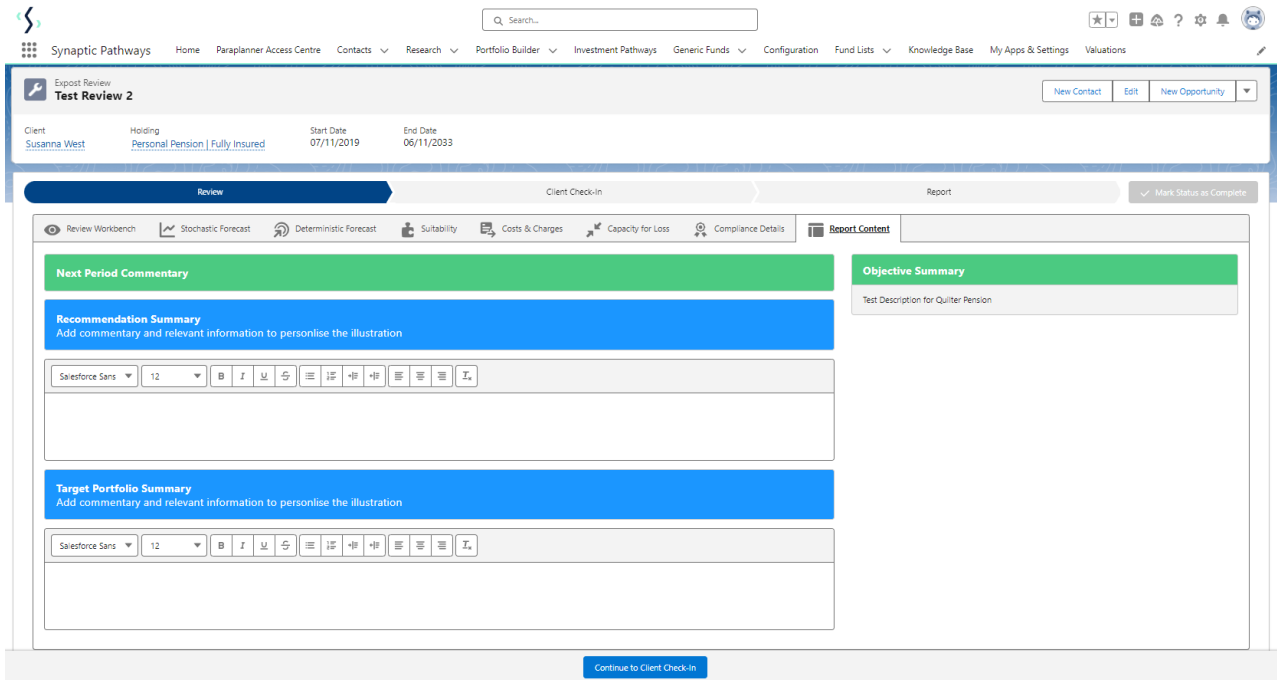


Ex-Post Reviews - Report Content

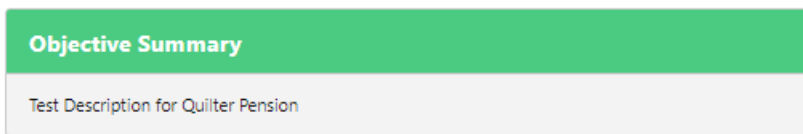
Last Modified on 01/12/2023 4:01 pm GMT

This article is a continuation of [Ex-Post Reviews - Compliance Details](#)

The **Report Content** contains a **Recommendation Summary** and **Target Portfolio Summary**. When completed, they will appear on the report.



The **Objective Summary** will pull through from the text entered in the Research>Add Investment screen.



Report Content is the last tab to review.

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Expost Review
Test Review 2 New Contact Edit New Opportunity

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 Commentary

Recommendation Summary
Add commentary and relevant information to personalise the illustration

Salesforce Sans 12 B I U

Target Portfolio Summary
Add commentary and relevant information to personalise the illustration

Salesforce Sans 12 B I U

Objective Summary
Test Description for Quilter Pension

Continue to Client Check-In

Continue onto the **Client Check-In** screen:

Continue to Client Check-In