Comparison & Ex-Ante using a CIP - Research Report

Last Modified on 16/10/2023 12:40 pm BST

A Report can be created on the Research report:

Besarch Susanna Comparison w/Ex-ante CIP	7777-2414-17 Sooms JURIZ — JUS GALL – ZZDZ	5411317 XXXIIII JUUTZ — JUXG21		1111/17Z - 1130SZ114	/// -> \\\ \ / /	Convert to Holding
Client Description Illustration Type Segment Na Susanna West Test Description Segment Segment 1						
Research	Review	Client Check-In	\rangle	Report	<u>м</u>	lark Status as Complete
Investments Trades Fees AUM Add Investments	Torm 10 C ^{et} Update Results	Change Segment Stake	cholder Pension Exclude Adviser Fees	3 Significant Figures		Report Report
Pensions Est Institute1 Anount Sile Category 239,828,70 Balanced (High End) Toget Porticio Auto Il Il	Filter Results by Provider Filter one or more providers	Filter Results by Product Filter one or more products		Sort Results by Ve Growth %	lbe Final Value £ Cha	arges £ RLY%
	V Platforms					11 of 11 Results
	AlBell Al Bell (Investcentre) Al Bell (Investcentre SIPP - Al Bell (Investcentre SIPP	lell investcentre investment ISA	Growth Final Value 3.76% £376,474.72	Total Fees £44,496.16	RLY 1.24%	
Individual Savings Accounts Instituent Amount Risk Category E25.652.000 Balanced (High End) Tages Porteito Auto B	transact Transact Virap SIDP + Transact	Wrap ISA	Growth Final Value 3.76% £376.426.17	Total Fees £44,544.70	R.L.Y 1.24%	+
	transact Transact Transact V	Vrap Personal Pension	Growth Final Value 3.76% £376.426.17	Total Fees £44,544.70	R.LY 1.24%	+
Synaptic	71M SIP + ISA (Stocks and Sha		Growth Final Value 3.75% £376,126.08	Total Fees £44,844.79	R.L.Y 1.25%	+
	7iM		Growth Final Value 3.74% £375,750.55	Total Fees £45,220.33	RUY 1.26%	+
1	Cancel	Continue to Ex-ante Illustration				

You can either view the report or download:

Synaptic Platform Co	mparison Summary				土, Download Report
Prepared For Susanna West					
Report Date					
16th October 2023					
Illustration Name					
Susanna Comparison w/Ex-ante CIP					
Firm Name					
Synaptic Pathways UAT Address					
	1777B				
1000					
Contraction of the local division of the loc					
Product Selection					
Selected Products					
 Pensions Individual Savings Accounts 					
- montobar samily: Accounts					
Individual Savings Accounts					
Summary of Investment, Contributions and Withdrawa	als .				
Initial Investment	Transfer In	Contributions over the Period	Withdrawal over the Period	Total Invested Over the Period	
£8,652.00	£10,000.00	£12,000.00	£5,000,00	£7,000.00	
Fund(s) Selected					
Fund Name		Weighting %	Amount £		
Vanguard LifeStrategy 20% Equity A Gross Acc GBP		37%	£6,901.24		
Vanguard LifeStrategy 80% Equity A		63%	£11,750.76		
Pensions					

