Switching - Comparison Report

Last Modified on 29/02/2024 10:35 am GMT

Create a **Comparison Report** on the top right of the results screen:

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Date of Birth Name Firm Name Date			
	ry 2024	Data	
		Date 29th February 2024	

	1 STORED		9.49 m	1.000	2.000 ft/	
SUMMARY OUTCOME						
Critical Vield 1.27%	Mid Growth Rate 1.50%	Hurdle Rate -0.23%	Final Value £436,818,81	Overall Growth 1.04%	R.LY 0.46%	
COMPARISON OF YIELDS						
Description The P1 Platform		Low Rate £359,516.79	Mid Rate £436,818.81	High Rate £504,609.54	Reduction in Yield 0.46%	
Combined Scheme(s)		£364,931.99	£427,135.71	£489,777.86	0.66%	
AEGON - DNH5677N		£99.562.00	£104,523.00	£116.956.00	2.48%	
Quilter - VB789hB		£265,369.99	£322,612.71	£372,821.86	0.00%	

CEDING SCHEME(S)

OMBINED SCHEME ummary rm yyrs 3Mos	Current Value £356.778.00	Transfer Value £357.650.00				current and transfer values are sum calculations only.
ombined Projection Results			and reduction in yield.			
rowth Rate	Adjusted Maturity Value	Reduction in Yield			Its is used to determine the hurdle rate	once the critical yield has been calculated.
1.50%	£364,931.99	0.27%				
50%	£427,135.71 £489,777,86	0.66%				
	1+03,777,00	0.1318				
EGON - DNH5677N olicy Details srm	Current Value	Transfer Value	Contributions Regular Contribution Gross £		Frequency of Contribution	Indexation for Contribution
IYrs 3Mos olicy Start Date	£102,655.00 Policy End Date	£103.528.00 Date of Ceding Data	£100.00		Monthly	0.00%
h October 2023	14th October 2033	13th October 2023				
eding Scheme Outcome versus Target Sch nese figures illustrate the outcome for the ceding sch	heme neme when compared to the target scheme in isolation.					
itical Yield 52%	Mid Growth Rate 1.50%	Hurdle Rate -2.02%	Final Value £127,163.54		Overall Growth 0.95%	Reduction in Yield 0.54%
ost & Charges ame	Amount as % or £	Frequency		Indexation %		Fee Notes
rojections	Growth Rate %	Maturity Value		Reduction in Yield		Adjusted Maturity Value
w.	-0.50%	£99,562.00		0.97%		£99,562.00
id	1.50%	£104,523.00		2.48%		£104,523.00
gh	3.00%	£116,956.00		2.82%		£116,956.00
UILTER - VB789HB			Control			
olicy Details	Current Value	Transfer Value	Contributions Regular Contribution Gross £		Frequency of Contribution	Indexation for Contribution
Wrs 3Mos	£254,123.00	£254,124.00	£200.00		Monthly	0.00%
licy Start Date th November 2023	Policy End Date 16th November 2023	Date of Ceding Data -				
eding Scheme Outcome versus Target Sch lese figures illustrate the outcome for the ceding sch	neme eme when compared to the target scheme in isolation.					
itical Yield 97%	Mid Growth Rate 1.50%	Hurdle Rate 0.47%	Final Value £308.261.45		Overall Growth 1.03%	Reduction in Yield 0.47%
ost & Charges ame	Amount as % or £	Frequency		Indexation %		Fee Notes
rojections	Growth Rate %	Maturity Value		Reduction in Yield		Adjusted Maturity Value
w	-0.50%	£265,369,99		0.00%		1265,369,99
a gh	1.50%	£322.612.71 £372.821.86		0.00%		£322.812.71 £372.821.86
ARGET SCHEME 1 INVESTMENT MANAGEMENT - THE P1 vestment Summary	SIPP					
arm Yrs 3Mos	Transfer Value (A) £357.650.00	Initial Adviser Fee (B) £0.00	Initial Amount Invested (A - B) £357,650.00		The total initial amount invested is	the transfer value of the ceding scheme(s) less the initial adviser fee.
eturn Summary ross Value 156.504.47	Cost & Charges £19,685.66	Final Value £436.818.81		Growth 1.04%		Reduction in Yield 0.46%
ontributions						
egular Contribution Gross £ 000.00		Frequency of Contribution Monthly			Indexation for Contribution 0%	
dviser Fees						
escription Itial Fee		Amount 0.00%	Value £ £0.00		Frequency	Contribution Count
igular Advice Fee		0.00%	£0.00		Annually	
agular Contributions Fee		0.00%			•	
ver How Many Contributions						
ost & Charges						
escription te P1 Platform	Fund Weighting	Total Fees £19,685.66	Final Value £436,818.81		Growth 1.04%	Reduction in Yield 0.46%
ne P1 SIPP						
anguard LifeStrategy 60% Equity A Shares Acc	100%	£19.627.68	£436,460.18		1.05%	0.45%
WITCHING COMPARISON - DETERMINIST						



Download at the bottom right of the report:

