

What report templates do you have on Synaptic?

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For most types of product, the system offers a choice of two Report Manager Templates (in addition to any bespoke ones your firm has created):

Template	Contents
Research Report	An appendix to a full suitability report, covering the research process within Synaptic Research, and how the recommended contract was arrived at. The document generated by Synaptic Research is complete in itself, but needs to be supplemented by information about affordability etc. in order to meet regulatory requirements.
Standard Report – <i>product type</i>	A template which generates a full suitability report, including not only the contents of a Research Report, but also background information about the selected type of product (e.g. what an investment bond is), and sections covering affordability, reviews etc. However, although the framework of the document is a complete suitability report, the sections on affordability etc. need to be completed manually (because they depend on information which is not part of Synaptic Research's process).
Multiple Report – <i>client name</i>	A template which includes all the functionality of the Standard Report, but merges two or more pieces of research into a single report. This functionality is available as an additional module at extra cost. Please contact your Synaptic account manager for more details.
