

Synaptic Pathways Modules Overview

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Entry Pack

- Salesforce Licence
- Contacts
- Holdings
- Attitude to Risk Questionnaire
- Portfolio Builder
- Asset Allocation
- Synaptic Risk Ratings
- Investment Pathways
- Central Investment Proposition
- Moody's Analytics
- Launch Product & Fund, Weblines & Retirement Analyser

Risk Explorer

- Risk Illustrations based on Moody's projections.
- Configure an investment scenario for research. This includes amount, withdrawals, contributions, term etc.
- Capture costs including platform, product, portfolio, adviser charging/input as a single RIY
- Model outcomes and downside risk/ Capacity for Loss (min gain).

Comparison with ex-ante

- Compare Platforms/Products
- Whole of Market or use a Central Investment Proposition
- Reduction in Yield
- Stochastic Projections
- MiFID II costs & charges disclosure
- Impact of costs, inflation and value of advice
- Ex-ante Illustration

Ex-ante (Pre-sales)

- Same as above, but use this to create an ex-ante illustration for a single product

Switching

- Product switching (including pensions, ISA, bonds)
- Consolidate one or more existing policies (ceding schemes) to a new single scheme
- Add Target scheme (Leave blank to compare all available products, select a product & add alternative product)
- Include Adviser Fees, Trades and Family assets under management
- Critical Yield, Hurdle Rate, RIY and Growth Rate
- Consolidation report
- Stochastic & deterministic methodologies

Income Analysis

- Cashflow/Retirement income analysis
- Configure an scenario, including
 - Investment details
 - Charges
 - Plans
 - Income requirements
 - State pension
 - Other incomes
 - Annuity
- PCLS, UFPLS and Phased Drawdown income strategies
- Results showing income and fund value
- Edit in Advanced Options

Synaptic Product & Fund Research

- Product Research
 - Fund Research
 - Fund Factsheets
 - Setup Preset Criteria
 - Reports
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