

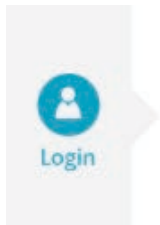


SYNAPTIC
COMPARATOR

Synaptic Comparator

Quick Start Guide

STEP 1.



www.synaptic.co.uk

- Passwords must have at least 8 characters, including a capital letter and number.
- After 3 incorrect attempts your account will lock out for 15 minutes.
- If you require a password reset, please contact the Support team.

Costs & Charges Calculator

Calculate projection rates adjusted for extra charges.

Projection Calculator

Calculate a projected maturity value where none currently exists.

Maturity Value Calculator

Calculates target maturity value given a table of projection and growth values.

Open Comparator

Click here to open Comparator in a new window.

Critical Yield Calculator

Calculates target growth rate given a table of projection and growth values.

TIP: Setup must be completed before starting any research

TECHNICAL SUPPORT

t: 0800 028 0033 e: support@synaptic.co.uk

SALES & CUSTOMER SERVICES

t: 0800 783 4477 e: customerservices@synaptic.co.uk



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STEP 2.

Any amount currently invested by a client, or members of their family, either on or off platform can be added here

Click once on your clients name for the 'actions box' to become available. You can then select 'new research'. If you require a password reset, please contact the Support team

The screenshot displays the Synaptic Comparator software interface. On the left, a sidebar contains a 'Contacts' list with 89 available contacts. Alice Oliver is selected. The main area shows the 'Personal' details for Alice Oliver, including her name, address (42 Elder Close, Fareham, Hants PO16 6YT), date of birth (04/02/1979), gender (Female), home and office phone numbers, mobile number (07398485754), email (Alice@test.co.uk), and service level (Silver). Below this, the 'Activities' section shows a list of research activities, including 'Research' and 'AliceComp2016'. A 'Setup' button is visible at the bottom left of the sidebar.

Before doing any research, you will need to setup your service levels, adviser fees etc.

Activities

- A tick indicates completed research with a report attached
- Incomplete Research

Service levels are created in the setup area, they can be used to configure adviser fees per service level

STEP 3.

Select the wrapper types you would like to research

We are building a picture of suitability

Investment details are added here

Use the next arrow to move through screens

Select features of the platform; these are the same features as Synaptic Product & Fund

GIA allows you to add a total investment into Unit Trusts/ OEICs, Investment Trusts etc. This field will be greyed out until you select the product from the feature list

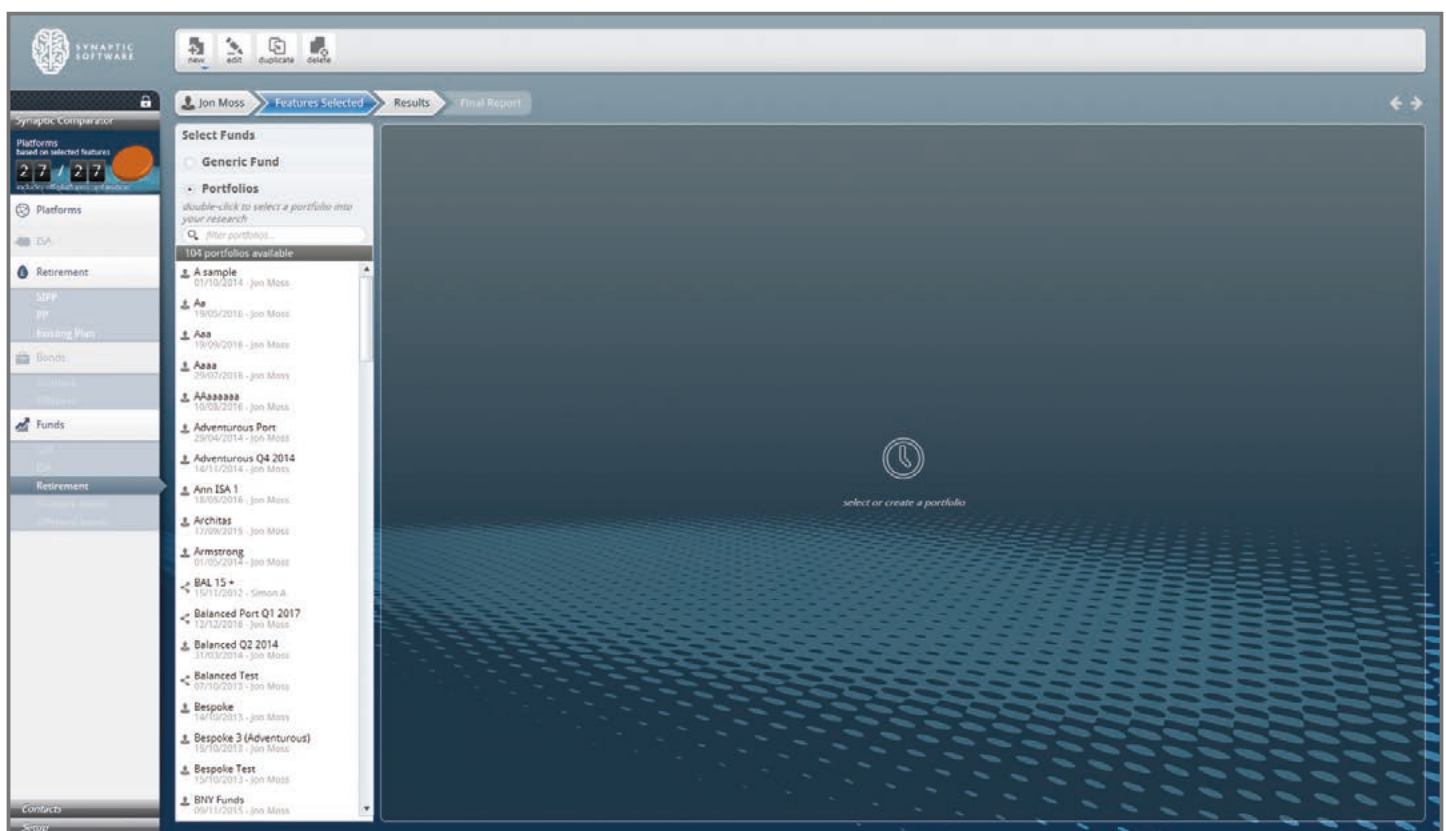
STEP 4.

Once you select the next arrow, this will take you through the product(s) you have selected. As seen below with the SIPP feature screen, you will also have to select features and add an investment amount for the product type.

STEP 5.

Adding portfolios / generic funds

Once you are in the fund area, you will need to add or use an existing portfolio for your chosen product types. The next arrow will take you to the results screen.



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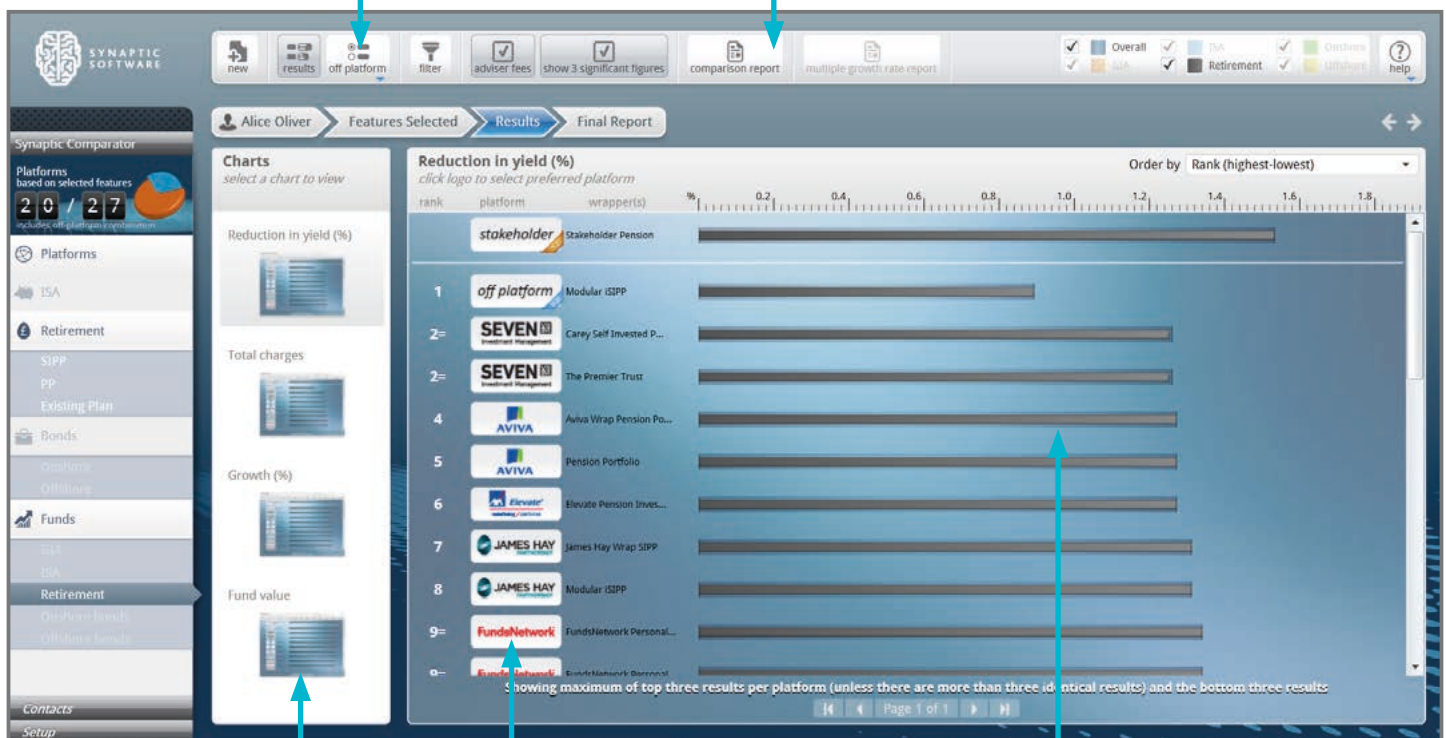
STEP 6.

Results Page

The results screen shows the Reduction in Yield, Total charges, net growth and projected fund value of the investment(s) from all applicable platforms and off-platform providers.

The results screen shows the cheapest off-platform solution. Click here to view all other off-platform investments

You can create comparison reports here



Select a chart here and you can change the view to show total charges, growth & fund value

Recommend an investment by clicking on the relevant platform or off-platform logo (all others will 'grey out') and then pressing the next arrow

Click on the chart to view the RIY – you can also view further detail - product breakdowns, adviser fees and interest rates etc.

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