



Alternative Investment Review

User Guide


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Existing Investment Details

Using the information provided below, complete all relevant 'white' fields and all mandatory fields in 'yellow'

Alternative Investment Help

 Please enter details of your alternative investment.

Valuation Date	<input type="text" value="11/02/2022"/>
Description	<input type="text" value="Art Collection"/>
Type of Product	<input type="text" value="Art"/>
Term of Investment	<input type="radio"/> Until <input type="text"/> <input checked="" type="radio"/> Years <input type="text" value="10"/> Months <input type="text" value="4"/> <input type="radio"/> Age <input type="text"/>
Current Value	<input type="text" value="£ 125000"/>

Field	Description
Valuation Date	Enter the date on which the quotation has been provided in dd/mm/yyyy format. This can either be entered manually or selected from the calendar.
Description	Enter the description.
Product Name	Enter the product name.
Type of Product	Select the type of investment from the drop down list.
Term of Investment	Select one of the given options Until: Choose an end date for the investment. Years: Number of years and/or months for the investment to run. Age: Input an age to run the investment to.
Current Value	Enter the value of the alternative investment

Existing Investment Projections

With the default set to Aggregate Rates, you user will be prompted to enter the appropriate growth rates for the investment.

Existing Investment Details - Projections
Help

Please enter the investment's value projections at term.

Growth Rate Basis: Aggregate Rates Varying Rates (%) Varying Rates (£)

Fund Projection Rates: Low % Med % High %

Investment Value at Term

Investment Value at Term	153383.44	206950.31	276878.25
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Use the 'calculate' option to create system generated projections. Calculate

If it's not possible to obtain projections for the investment, the Calculate button can be used to generate projections to any given rates. Additional fixed fees may also be added with any indexation applicable.

Calculate Projections
✕

Fund Charges	Charge (%)	Split (%)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	✕

Additional Percentage Charges	Amount (%)	Applied	Indexation	
<input type="text"/>	<input type="text"/>	Monthly ▼	None ▼	✕

Monetary Charges	Amount	Applied	Indexation	
Storage Charge <input type="text"/>	150	Monthly ▼	None ▼	✕

Calculate

Existing Investment - Details

Details of the alternative investment can be added using the free text box provided and will be shown in the report. Click Finish to save.

You can then navigate Back to Existing Cases or create New Investment using the grey triangle symbol that appears on the top right navigation bar.