



REVIEW SCORECARD

© RIE SOLUTIONS 2019

Profile Partner Service Scorecard for Mr & Mrs J Blogs

Portfolio Valuation

	Last Year – Date	This Year – Date
Mr Blogs	£ 196,677.98	£ 198,889.45
Mrs Blogs	£ 234,005.45	£ 220,987.50

Core services provided in the last 12 months

- Review of your financial objectives against your cash flow forecast.
- Rebalance of your asset allocation.
- Sounding board service.
- Revised pension strategy to facilitate early retirement.
- Two review meetings held during the year.
- Access to our secure online portal, which aggregates all your financial data.

Value Added by Profile Partner Services, year to date

Description	Value
Error on Prudential statement	£658
Pension strategy	£3,100 tax saving annually
Annual investment cost saving	£4,300 cost saving annually
Capital Gains Tax saving	£1,968
IHT savings	£370,000

Aggregated costs for the last 12 months

Fee(s) / Charge(s)	Amount £	Percentage %
Fund charges		
Product charges		
Platform charges		
Advice charges		
Total		

Expected aggregated costs for the next 12 months

Fee(s) / Charge(s)	Amount £	Percentage %
Fund charges		
Product charges		
Platform charges		
Advice charges		
Total		

This document was created based on the original 'Scorecard' and concepts developed by FP Advance Ltd