



Pathways

6.11 Release Notes



1 In this release

This release extends the Cashflow Retirement Edition journey to allow for joint client research to be conducted, each client's pension holdings, state pensions, other incomes and annuity options can be considered. In addition to Cashflow updates, this release includes updates and tweaks to existing features based on user feedback.

The [Knowledgebase](#) contains FAQs and guides to walk you through Pathways functionality.

If you require support assistance, contact, support@synaptic.co.uk or call 0808 164 5463.

Synaptic Pathways Licensed Features

- Pathways Introductory Pack
- Pathways Cashflow Retirement Edition
- Pathways Comparison and Ex-ante
- Pathways Ex-post
- Pathways Protection
- Pathways Risk Explorer
- Pathways Switching
- Pathways Valuations

To arrange a demo of the new or existing functionality, contact hello@synaptic.co.uk, call 0800 783 4477 or [Book a Demo](#) direct from our website.

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2 New features and enhancements

These are available immediately on Pathways. If you do not have access, please click the 'Request Access' button on the feature within Pathways to arrange a demo or contact one of the team on 0800 783 4477 or hello@synaptic.co.uk.

2.1 Joint Life Research - Cashflow Retirement Edition

- Cashflow Retirement Edition journey has been updated to allow for joint life research.
- Joint client research will consider both lives'
 - Tax Status
 - Pensions
 - Other Incomes
 - Annuity options
 - Combined Income requirements during retirement
- The advanced options screen has been updated to allow for easy management of comparison scenarios by amending the investment scenario or the position of each individual client.
- The Cashflow report has been updated to reflect both clients when joint life research has been conducted.
- When converting joint life research into an ex-ante recommendation, one ex-ante research will be created for each client. Each client's withdrawal profile, along with the initial fund value after any PCLS withdrawals, will be carried over to the cashflow research.

3 General updates

To ensure Pathways continues to meet customer needs, feedback and reported issues are incorporated with each release.

- The date format for income sources in the Cashflow journey has been updated to the UK format.
- Tab order updated on Cashflow results screen.
- Monthly amount toggles for income sources and profiled income to allow for annual amounts to be split over 12 months.
- Fixed an issue where RIY would not display for the consolidated switching scheme in the Switch journey when there was only one scheme.
- A check has been introduced for generic products entering the Ex-post review journey to verify that the funds are still in existence.
- ATRQ report occasionally displayed today's date as the client's date of birth when the client's date of birth had not been entered.
- A scenario where using multiple products in the Ex-ante journey could cause fund charges to not be displayed on the costs and charges statement.
- User can no longer delete Ex-ante research that has been linked to an Ex-post review.
- The maximum single withdrawal limit field validation has been increased to 10 million.
- Updated validation on ceding scheme charges modal.
- Fixed an issue in the Network Edition CIP that could cause off-platform products to be removed from the CIP

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