Central Investment Proposition -Adding Off Platforms to a Segment

Last Modified on 13/02/2024 3:35 pm GMT

To add Off Platform products to the segment, click into the **Off Platform Products** tab:

Segment Details - Segment 1 Test		
Platforms	Gff Platform Products	Portfolios
Off Platform Products		

Click on the Off platform product you would like to add to the segment:

Platforms Off Platform Products Portfolios	📰 Fund Lists 🗖 Adviser Fees 💄 Assign Users
What's shown here	Product Selection from CIP
Select which Off Platform Products should be included in the Segment. Including Off Platform Products will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.	Off Platform Products Available in CIP

Once selected, click the arrow to move the product over to Off Platform Products in Segment

Platforms E Off Platform Products E Portfolios	📰 Fund Lists 🗖 Adviser Fees 💄 Assign Users	
What's shown here	Product Selection from CIP	
Select which Off Platform Products should be included in the Segment. Including Off Platform Products will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.	Off Platform Products Available in CIP Flexible Transitions Account (LV= Core Funds) - LV= Pension Portfolio - Royal London Personal Pension - Aviva Life & Pensions UK Limited Prudential Retirement Account - Prudential Assurance Company The Retirement Account - Pension Savings - Canada Life	Off Platform Products in Segment Move selection to Off Platform Products in Segment

Platforms Gff Platform Products Portfolios	🗐 Fund Lists 🔹 Adviser Fees 💄 Assign Users	
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Multiple products can be moved at once. Click on the first product, type CTRL A to select all the products in the list.

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If you don't wish to move all products, click the first product, hold CTRL and click the products you would like to move.

Platforms Off Platform Products Portfolios	🗐 Fund Lists 🔹 Adviser Fees 💄 Assign Users	
What's shown here	Product Selection from CIP	
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Including Off Platform Products will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.	Pension Portfolio - Royal London	4
	Personal Pension - Aviva Life & Pensions UK Limited	
	Prudential Retirement Account - Prudential Assurance Company	
	The Retirement Account - Pension Savings - Canada Life	

Once done, move onto Central Investment Proposition - Adding Portfolios to a Segment