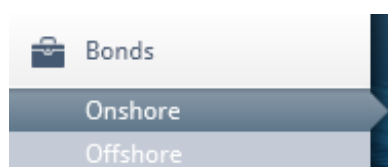


Investment details for Onshore and Offshore bonds

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When including an Onshore or Offshore bond in your research, you need to complete the Onshore and/or Offshore bond **Investment** panel.

Click on **Bonds** in the left hand menu.



If you have only chosen one bond type, that one will be highlighted (shown above within the arrow) if you have chosen both by default you will start on **Onshore** (you can either use the right navigation arrow to move to the next one, or click on it directly).

In the right hand **Investment** pane, complete the amount of contribution that will be invested in the bond. The client's age will be pre-populated for the life assurance. If there is anyone younger insured on the policy, you will need to change it to reflect the youngest persons age.

Investment
please enter details of the amount you would like to invest

amounts (£)

initial

transfer

LIFE ASSURANCE

youngest life years

Once the features and investment information has been completed for each wrapper, navigate to the funds section and select the portfolios for each wrapper.
