

Investment details for a Personal Pension

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When including a Personal Pension in your research, you need to complete the **PP Investment** panel.

Click on **PP** in the left hand menu



In the right hand **Investment** pane, complete the amount of contribution that will be invested in the PP. If a regular contribution is to be made, select the frequency from the drop down list (Options are: Monthly, Bimonthly, Quarterly, Half-yearly & Annually) then enter the amount. Finally record any indexation if applicable (Options are: RPI, CPI, NAEI & Other).

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

amounts (£)

initial

transfer

frequency

regular

INDEXATION

type

value (%)

Once all the features and investment details are completed, navigate to the **Funds** section of the left hand pane to complete select or set up the relevant Portfolios.