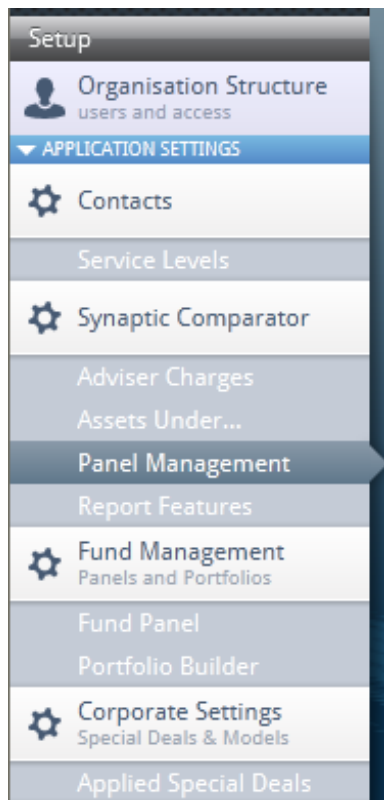


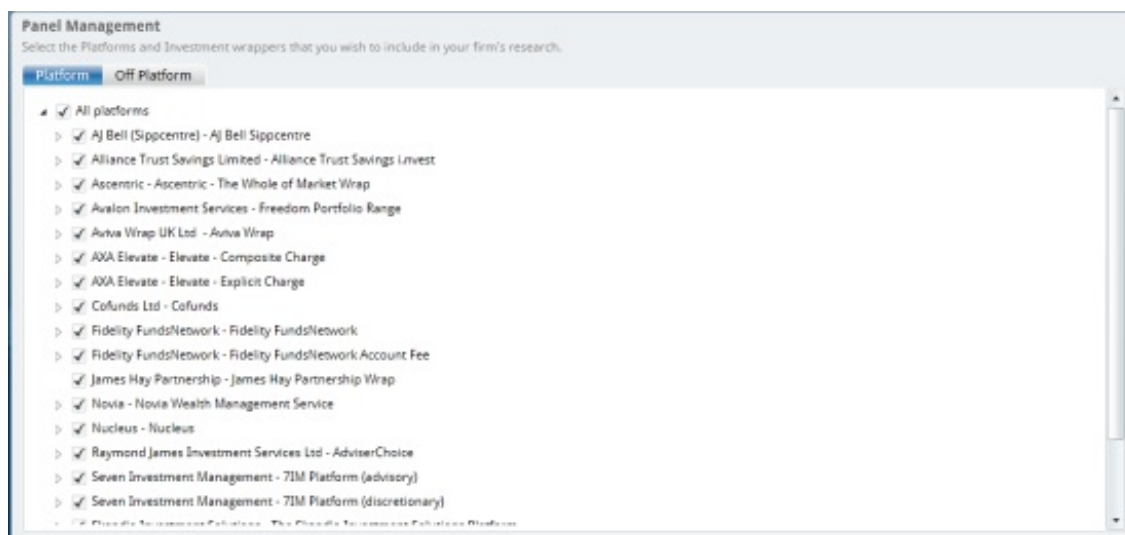
Panel Management

Last Modified on 26/04/2017 2:30 pm BST

Select **Setup** from the menu on the left hand side and then choose **Panel Management**:



You will then see the **Panel Management** menu:



Panel Management will allow you to remove or enable a previously excluded Platform in your research. There is also an option to do this for the Off Platform products which are included on Comparator.

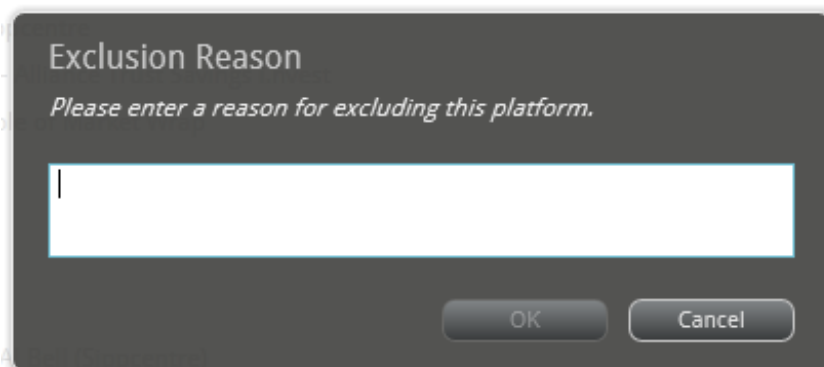
You have three options when excluding Platforms:

- 1) You can exclude the whole Platform by clicking to remove the tick against the platform name,
- 2) You can click on the triangle icon to expand the selection, and remove wrapper types within the Platform from your research (SIPP, Bonds, PP etc..):
- 3) You can open up a wrapper type and remove a specific product.

The example shown is for Ascentric. Use the arrows to the left of each section to open up the menu further:

- ▲ Ascentric - Ascentric - The Whole of Market Wrap
 - ▷ ISA
 - ▷ Offshore Bond
 - ▷ Onshore Bond
 - ▲ SIPP
 - AJ Bell Sippcentre SIPP - AJ Bell (Sippcentre)
 - Alltrust SIPP - Alltrust Services Limited
 - Ascentric Pension Account - Ascentric
 - BrilliantWithMoney SIPP - BrilliantWithMoney
 - Dentons SIPP - Dentons Pension Management Limited
 - Elite Retirement Account - Talbot & Muir SIPP LLP
 - Full SIPP - @SIPP Pension Trustees Ltd
 - IPM Personal Pension Scheme - I.P.M. SIPP Administration Limited
 - MC Trustees Self Invested Pension - M C Trustees Limited

When you click on a Platform, or an element of a platform, you will be asked to provide an **Exclusion Reason**:



Exclusion Reason

Please enter a reason for excluding this platform.

|

OK Cancel

This **Exclusion Reason** will appear on the report you generate at the end of the research to explain why the platform was not included in your results.

To enable a previously excluded Platform, simply re-tick the Platform for it to re-appear in your results.

To do this for the **Off Platform** products, click on the tab at the top of the page:

Panel Management
Select the Platforms and Investment wrappers that you wish to include in your firm's research.

Platform **Off Platform**

- ▲ Off Platform Products
 - ▶ Offshore Bond
 - ▶ Onshore Bond
 - ▲ PP
 - active money personal pension - Initial Commission (Full) - Standard Life Assurance Ltd
 - Flexible Pension Plan - Financial Adviser Charge Option - AEGON
 - Pension Portfolio (Financial Advisers Fee) - Scottish Life (Royal London)
 - Personal Pension - Aviva Life & Pensions UK Limited
 - Pru Flexible Retirement Plan - Prudential Intermediary Division
 - Retirement Wealth Account FAR (Nil Commission) - AXA Wealth
 - Self Invested Personal Pension - Zurich Assurance Ltd
 - The Retirement Account - Flexible Commission - Scottish Widows
 - ▶ SIPP

Complete this area, if appropriate, in the same way as for Platforms.

Once you have finished enabling/excluding in **Panel Management**, click **Save** to record your changes and exit the **Panel Management** menu. Alternatively, you can click **Cancel** if you decide not to keep the changes.