

How do I save results from the fund picker and include it in reports?

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The results of the Fund Picker – i.e. your chosen selection of funds – must be saved using the **Save list** button which is highlighted in the screenshot below. The list of selected funds is then included in any suitability reports which you generate, providing documentation of the funds you are recommending.

This **Save list** button is displayed **only** under the following conditions: You are looking at the list of linked funds in the context of a piece of research. (In other words, it is not displayed if you open a contract factsheet from the home page, and then view the linked funds on the contract.) The contract in question has already been marked as the selected contract for the piece of research.

For example, the button is displayed if you use the Fund picker from the report selection screen, when you have selected a contract. This link is highlighted in the screenshot below.

