

Can I manually exclude contracts?

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As well as (or instead of) filtering the grid of contracts, you can also manually select which contracts to include. This is particularly useful for comparing a specific set of contracts rather than the whole of market – e.g. product provider competitor analysis, multi-tie research etc.

N.B. Manual exclusion only applies to product research. It is not available on fund research.

You can specify the contracts to include/exclude in either of two ways:

Excluding individual contracts

You can remove an individual contract by clicking the right mouse button over the contract name in the grid, and choosing Exclude contract. This displays the pop-up window illustrated by the first screenshot.



Zurich Intermediary Platform
Zurich Intermediary Platform Stocks and Shares ISA Account

Reason for excluding the contract (optional):

Not included on Head office approved list.

Exclude contract Cancel

Optionally, you can enter text describing why the contract is being excluded. This reason is then included in any suitability reports or Quick Reports which you generate.

Excluding multiple contracts at once

You can exclude several contracts at once by clicking on the link at the top of the grid where it says “0 manually excluded”. This is highlighted in the screenshot below.

Filtering | Ranking | Report | Quote | Comparison | Change title | Save as PDF | Delete | Copy | Send | Not shared | Help

Features | Factors | Conditions | State | Filter

Minimum age at entry (NB) policy holder: [35] []
 Minimum age at entry (NB) life assured: [35] []
 Maximum age at entry (NB) policy holder: [35] []
 Maximum age at entry (NB) life assured: [35] []
 Minimum initial investment (£): [45] [100000]
 Minimum additional investment (£): [35] []
 Minimum amount per policy (£): [35] []
 Max number policies per bond: [35] []

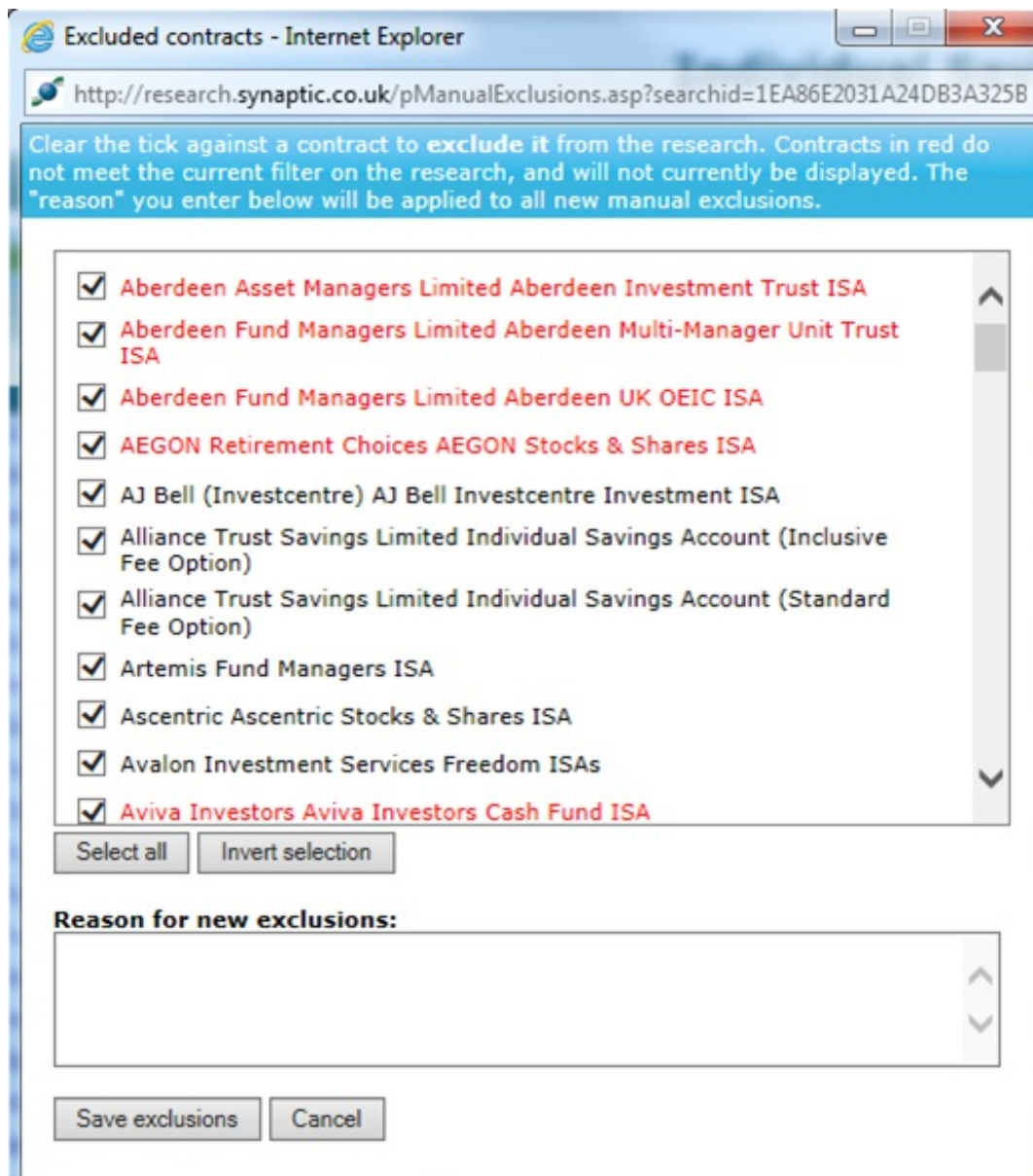
Initial/establishment charge
 Additional bond charges
 Exit charge year 1 (%): [35] []
 Exit charge year 2 (%): [35] []
 Exit charge year 3 (%): [35] []
 Exit charge year 4 (%): [35] []
 Exit charge year 5 (%): [35] []
 Exit charge year 6 (%): [35] []
 Exit charge year 7 (%): [35] []
 Exit charge year 8 (%): [35] []
 Exit charge year 9 (%): [35] []
 Exit charge year 10 (%): [35] []
 Penalty for partial surrender: [35] []
 Penalty for full surrender: [35] []

Clear all filters | Audit trail | Import filter

All 20 contracts - 0 manually excluded

Company	Contract	Extra life cover available	AGU Unit Linked Business	Maximum age at entry (NB) policy holder
Aviva Life & Pensions	Select Investment Growth & Income	No	5	None
AXA Wealth	Investment Bond (Adviser Charging)	No	5	None
Canada Life	CanInvest Select Account	No	4	None
HSBC Life (UK) Ltd	HSBC Onshore Investment Bond (Se	No	3 opt	None
Legal & General	Select Portfolio Bond	Yes	5	99
MetLife Services Ltd	MetLife Investment Bond	No	4	95
Nucleus	Nucleus Onshore Bond	No		None
Old Mutual Wealth	Collective Investment Bond	Yes	5	85
Prudential Intermediar	Prudential Inheritance Bond	No	5	90
Prudential Intermediar	Prudential Investment Plan (PIP)	No	5	None
Prudential Intermediar	Prudential Onshore Portfolio Bond	Yes	5	90
Sarlam	Portal Onshore Bond	No	3 opt	No Maximum
Sarlam	Versatile Investment Portfolio	No	3 opt	None
Scottish Friendly	Scottish Friendly Onshore Bond Platf	Yes		80
Scottish Widows	Investment Bond - Initial charge opt	No	4	None
Scottish Widows	Investment Bond - Withdrawal charg	No	4	None
Standard Life Assuran	Onshore Bond (Wrap)	No	5	89
Standard Life Assuran	Tailored Investment Bond	No	5	None
Sterling Assurance	Sterling Investment Bond	Yes	5	80
Transact	Transact Wrap Onshore Bond	Yes	3 opt	None

The system displays a pop-up window listing all the contracts, as illustrated by the second screenshot. You simply remove the ticks from any contracts which you don't want to include in your research. Again, you have the option of recording a reason for this which is then shown in suitability reports.



Contracts which are listed in red on this pop-up window are being excluded from the grid because of the conditions you are filtering on. Ticking these contracts in the pop-up exclusion screen will not cause them to be included in the grid until you remove whatever filtering conditions the contracts do not meet.

WARNING! – Once a contract has been manually excluded, it will remain excluded within that piece of research until it is re-included or until it is withdrawn by the product provider. If your reasons for the exclusion of the contract are in respect of its features, conditions, statistics, performance etc, you should be aware that even if the data changes, the contract will remain excluded. If manual exclusions have been used within **Preset Criteria**, we strongly recommend that manual exclusions are revisited periodically to ensure that the reasons for exclusion remain valid.

