

Filtering the grid of contracts

Last Modified on 14/06/2017 10:47 am BST

The left-hand side of the grid screen shows all the fields of data which are recorded about the contracts, divided up into tabbed groups. (The fields and tabs which are available depend on the type of contract.)

SYNAPTIC SOFTWARE

Personal Pension (Fully Insured)

Personal Pension (Fully Insured)

Filtering (using preset criteria) | Ranking | Report | Quote | Comparison | Change title | Save as PDF | Delete | Copy | Send | Shared | Help

20 contracts out of 25 (80%) - 0 manually excluded

Company	Contract
AEGON	One Retirement
Aviva Life & Pensions UK Limited	Personal Pension
AXA Life Invest (AXA Life Europe)	Secure Advantage+ Pension Plan
AXA Wealth	Retirement Wealth Account (Adviser Charging)
Canada Life	CanRetire Pension Investment Plan
Cofunds Ltd	Cofunds Pension Account (provided by Suffolk Life)
FundsNetwork	FundsNetwork Personal Pension
Legal & General	Portfolio Plus Pension
MetLife Services Ltd	The NetLife Retirement Portfolio (Secure Capital G)
MetLife Services Ltd	The NetLife Retirement Portfolio (Secure Income C
Old Mutual Wealth	Collective Retirement Account
Old Mutual Wealth	CRA Wealth Select
Old Mutual Wealth	Personal Pension - Single Price
Prudential Intermediary Division	Pru Flexible Retirement Plan
Royal London	Pension Portfolio
Sanlam	Portal Personal Pension
Scottish Widows	The Retirement Account - Initial Adviser Charging
Standard Life Assurance Ltd	active money personal pension

Features | Sectors | Conditions | Stats | PP

- Flexible access drawdown facility
- Option to take full UPPLS
- Option to take partial UPPLS
- Payment frequency options
- Payment methods
- Pension premium insurance
- Guarantee options
- Accept minors
- Switching option
- Automatic rebalancing
- Lifestyle strategy
- Model portfolios
- Death benefits

Clear all filters | Audit trail | Import filter

Features tab

The first, **Features** tab lists all the features offered by any of the contracts. Ticking the box next to a feature simply removes contracts which do not offer that feature. Ticking a second feature removes all the contracts which don't offer both features.

At the top of the grid, the caption tells you how many contracts meet all the conditions you're filtering on, and there's also a horizontal bar representing the percentage remaining.

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Features | Sectors | **Conditions** | Stats | PP

8 contracts out of 95 (8%) - 0 manually excluded

Company	Contract
AXA Elevante	Elevante Stocks & Shares ISA - Explicit
Novia	Novia Stocks & Shares ISA
Nucleus	Nucleus ISA account
Seven Investment Management	ISA (Stocks and Shares)
Standard Life Assurance Ltd	Standard Life FundZone ISA
Standard Life Assurance Ltd	Wrap ISA
Zurich Intermediary Platform	Zurich Intermediary Platform - Cash ISA Account
Zurich Intermediary Platform	Zurich Intermediary Platform Stocks and Shares IS

Clear all filters | Audit trail | Import filter

N.B. You can also filter on data items by adding the item to the grid and then clicking on any of the values in the new column. This will generate a short list of filtering options, such as 'greater or equal to' or 'Less or equal to' etc.

Sectors tab

The **Sectors** tab shows all the sectors in which any of the contracts offers a linked fund – e.g. UK Equity, UK Fixed Income, money market, real estate . You simply tick all the sectors in which you want to invest the client's money, and the system removes contracts unless they offer a fund link in all the sectors you've asked for.

The **Sectors** tab also allows you to search for specific funds – i.e. to identify only those contracts through which a fund or basket of funds can be bought.

NOTE – the **Sectors** tab requires a sector definition choice to be made (between FE Global and IMA/ABI/AIC) before sectors can be chosen.

Conditions tab

The **Conditions** tab shows policy conditions such as minimum age at entry, minimum investment, exit charges etc. You can filter on all numeric fields – for example, remove any contracts where the minimum age would prevent your client being able to take out the contract.

Stats tab

The **Stats** tab contains financial strength fields, plus other information such as the

number of linked funds, projected surrender values etc. These fields can be filtered in the same way as policy conditions. For example, the second screenshot shows how to eliminate all contracts whose AKG financial strength rating is worse than 4.

Investment Bond Unit Linked

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5 contracts out of 20 (25%) - 0 manually excluded

Company	Contract	Minimum initial investment (£)	Minimum additional investment (£)	Minimum amount per policy (£)
AXA Wealth	Investment Bond (Adviser Charging)	£15,000	£1,000	£500
Canada Life	CanInvest Select Account	£5,000	£1,000	£1,000
Standard Life Assurance	Onshore Bond (Wrap)	£5,000	£1,000	£0
Standard Life Assurance	Tailored Investment Bond	£15,000	£2,500	£150
Sterling Assurance	Sterling Investment Bond	£5,000	£1,000	£0

PP tab

The **PP** tab contains past performance data for all the sectors in which any contract has a fund link – you click on the name of each sector to view the fields inside it.

The third screenshot shows how to filter out any contracts which don't have a UK Equity fund with positive alpha (i.e. a better risk/reward profile than the sector average).

Individual Savings Accounts ISA

Filtering (using preset criteria) | Ranking | Report | Comparison | Change title | Save as PDF | Delete | Copy | Send | Not shared | Help

14 contracts out of 95 (15%) - 0 manually excluded

Company	Contract	Offshore Funds: B:Equity - UK - Alpha
Alliance Trust Savings Limited	Individual Savings Account (Inclusive Fee Option)	0.71
Alliance Trust Savings Limited	Individual Savings Account (Standard Fee Option)	0.71
Ascentric	Ascentric Stocks & Shares ISA	1.08
Avalon Investment Services	Freedom ISAs	1.08
AXA Elevate	Elevate Stocks & Shares ISA - Explicit	1.08
James Hay Partnership	James Hay Wrap ISA	1.08
James Hay Partnership	Modular Stocks & Shares ISA	1.08
Novia	Novia Stocks & Shares ISA	1.08
Nucleus	Nucleus ISA account	1.08
Platform One Limited	IFDL ISA	0.86
Standard Life Assurance Ltd	Wrap ISA	0.52
Transact	Transact Wrap ISA	1.08
Zurich Intermediary Platform	Zurich Intermediary Platform - Cash ISA Account	1.08
Zurich Intermediary Platform	Zurich Intermediary Platform Stocks and Shares ISA	1.08

NOTE – the **PP** tab requires a sector definition choice to be made (between FE Global

and IMA/ABI/AIC) before filtering can be done on past performance data (unless the choice has already been made on the Sectors tab).
