

# Entering client details

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You can view a factsheet for an individual contract simply by clicking on its name in the grid (clicking on the company name displays a factsheet for the provider). The contract factsheet is illustrated by the first screenshot, and can be saved in PDF format using the link on the menu bar below the page's title.

**Contract details** | [Back to Filtering](#) | [Save as PDF](#) | [Linked funds](#) | [Help](#)

Choose the information to display  
 Features  Conditions  Financial strength  Stats  Notes

Sectors  Linked funds  
IMA/ABL/AIC Sectors

**Contract summary**

Contract name: Nucleus Onshore Bond  
Provider: Nucleus  
Product type: Investment Bond, Unit Linked

**Contract features** (Items marked with \* are clarified by policy conditions)

Discounted gift bond	Yes*	Applications	Yes
Discounted gift friendly	Yes	Online/extranet valuations available	Yes*
Single life	Yes	Projected illustrations	Yes
Joint life first death	Yes	Switch facility	Yes
Joint life last survivor	Yes	Redirect facility	No
Extra life cover available	No	Risk profiling tool	No
Life of another	No	Mobile applications	No
Death benefit	Yes*	Fund valuations	Yes*
Greater than bid value	Yes*	Unlimited no of telephone valuations	Yes*
Original investment (minus withdrawals) if greater than bid value	No	Open architecture	Yes*
Phased investment facility	No	Illustrations	Yes
Split investment (UL/UWP)	No	Asset driven growth rates	Yes
		Asset driven growth rates vary with term	Yes

A contract factsheet consists of a number of sections such as features, policy conditions, financial strength etc. You can choose which are included using the tickboxes at the top of the page.

The factsheet also includes a list of all linked funds available on the contract. However, this information can also be obtained in a quicker and more concise form: click the right mouse button over the contract name in the grid. This displays the pop-up menu illustrated by the second screenshot.



## Individual Savings Accounts

ISA

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

Features | Sectors | Conditions | Stats | PP

10 contracts out of 95 (11%) - 0 manually excluded

Company	Contract
AEGON Retirement Choices	AEGON Stocks & Shares ISA
AXA Elevate	Elevate Stocks & Shares ISA - Explicit
James Hay Partnership	Modular Stocks & Shares ISA
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 ISA

Contract options

- View contract details
- Linked funds**
- Fund picker
- Show the linked funds available on this contract
- Exclude
- View contract notes

Clear all filters | Audit trail | Import filter

You simply choose **Linked funds** from the pop-up menu, and the system displays a page listing all the funds available on the contract, and details about their past performance (including risk-adjusted measures such as alpha and beta.)

This list of linked funds is illustrated by the third screenshot and again, it can be saved in PDF form.



## Zurich Intermediary Platform

Zurich Intermediary Platform Stocks and Shares ISA Account

Linked funds on this contract | Back to filtering | Fund picker | Save as PDF | Fund research | Contract | Help

**Provider and contract type:**

Contract name: Zurich Intermediary Platform Stocks and Shares ISA Account  
 Provider: Zurich Intermediary Platform  
 Product type: Individual Savings Accounts, ISA

Select funds | Show factsheets | Graph | Select all | Invert selection | Clear all | Show all | FE Global Sectors

GL:Absolute Return	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	InitChg	AMC
<input type="checkbox"/> Aberdeen UK Flexible Strategy B	2.62	6.33	6.84		1.14	0.55	48	3	0.00	0.75
<input type="checkbox"/> Absolute Insight W	0.80	2.93	3.17		0.45	0.09	37	4	0.00	0.75
<input type="checkbox"/> Artemis Pan-European Absolute Return I Hedged Acc GBP	9.32								1.00	0.75
<input type="checkbox"/> Artemis US Absolute Return I Hedged Acc									1.00	0.75
<input type="checkbox"/> Aviva Inv Multi Strategy Target Income 2									0.00	0.75
<input type="checkbox"/> Aviva Inv Multi Strategy Target Return 2	6.13								0.00	0.75
<input type="checkbox"/> BlackRock Absolute Return Bond D	-0.37	1.02			0.32		1	2	0.00	0.50
<input type="checkbox"/> BlackRock Dynamic Return Strategy D									0.00	0.80
<input type="checkbox"/> BlackRock UK Absolute Alpha D Acc	8.04	5.14	2.49		1.42	0.13	29	1	0.00	0.75
<input type="checkbox"/> BlackRock UK Absolute Alpha S Acc								1	5.00	0.67
<input type="checkbox"/> BlackRock UK Absolute Alpha S Inc								1	5.00	0.67
<input type="checkbox"/> CP Canlife Strategic Return C Acc	-1.13								4.75	0.75

Provided that your firm has paid for this module, you can then tick boxes next to one or more funds, and generate factsheets about those funds.