How do I add a Self Invested Personal Pension (SIPP)?

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Plans, Assets and Accounts form the building blocks for SIPPs. In order to input a SIPP as a holding you need to add a SIPP and then add the Plans, Assets or Accounts as part of that SIPP.

To add a SIPP click on the **Add** button on following screen:

Input the SIPP details

Then select SIPP Holdings using the following tab:

Once in the tab, you have the option of adding in **Plans, Assets and Accounts** using the **Add** button.

Follow the instructions for plans, assets or accounts as above.

You also have the option of accessing the Underlying Assets tab to give an overall picture of the plans, assets and accounts that make up the SIPP.

SIPP Underlying Assets
Asset Classes derived from underlying plans and assets

Asset Class	% Allocated	Value
UK Equities	76.75	£34,333.73
Global Equities (ex UK)	17.19	£7,689.86
Cash	6.00	£2,684.07
Emerging Markets Equities	0.06	£26.84

Asset Allocation

- UK Equities (76.75%)
- Global Equities (ex UK) (17.19%)
- Cash (6.00%)
- Emerging Markets Equities (0.06%)
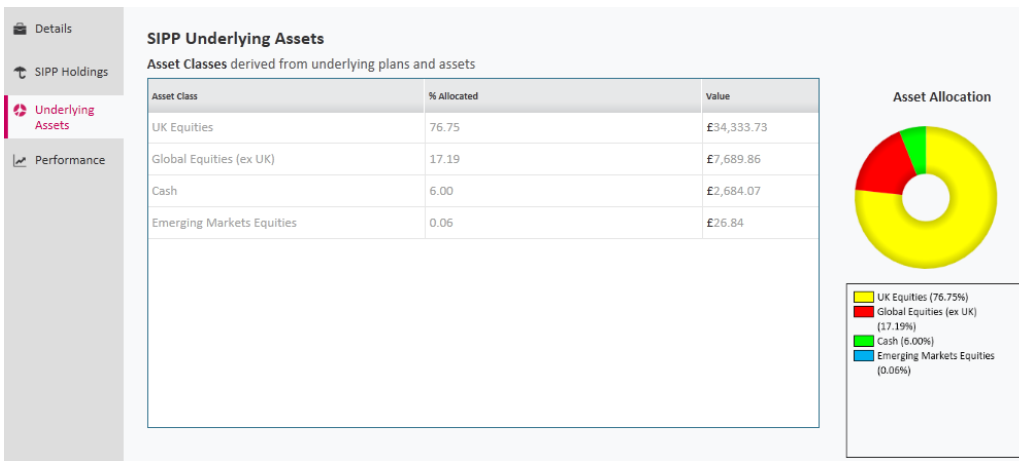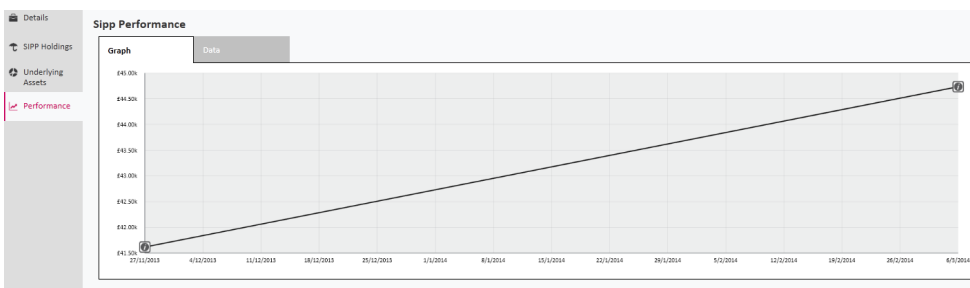
You can also access the Performance tab, from here you can see the overall performance of the SIPP.

You should note that it is only possible to create valuation points within the plans, assets or accounts that make up the SIPP and not the SIPP itself.

Once completed click on **Save and Close**

The SIPP details will then show as follows:

SIPPs (1)

Name	Provider	Product	Status	Value	Assigned To	Add ⊕
Test SIPP	Sample Provider	TEST SIPP	In Force	£20,550.15		

▸ **Assets (0)**

▸ **Accounts (0)**

▾ **Plans (1)**

Name	Provider	Product	Status	Value	Assigned To	
TEST ISA			In Force	£20,550.15		

Total value of SIPPs £20,550.15