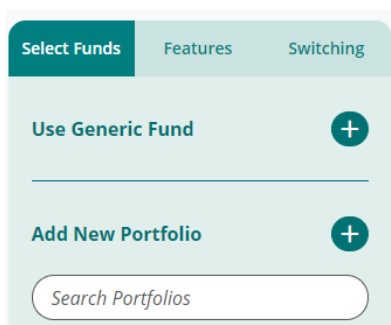


# Filtering Screen

Last Modified on 14/02/2020 8:43 am GMT






The filtering navigation detailed on the left hand side. From here you can carry out:

**Portfolio/Fund selection** – This tab is where you select the fund/portfolio to use, add a new fund/portfolio or use a generic fund for the product comparison. Any portfolios that exist within your hierarchy are displayed here.

**Features** – This tab contains a Provider driven and verified feature list that enables you to select desired features and filter the products that support those features accordingly.

**Switching** – This allows you to detail any switching activity. Any cost associated with switching will be included in the calculations.

	Transact Transact Wrap SIPP Income Drawdown	Transact	
	Aviva Wrap UK Ltd Aviva Wrap Pension Portfolio	Aviva Wrap	Option to take full UFPLS
	Canada Life CanRetire Flexible Drawdown Plan	Off	Option to take full UFPLS

When a product is filtered from the research, the product is 'greyed out' and the item that has removed the product from the research is displayed next to it.