

Central Investment Proposition - Adding Portfolios

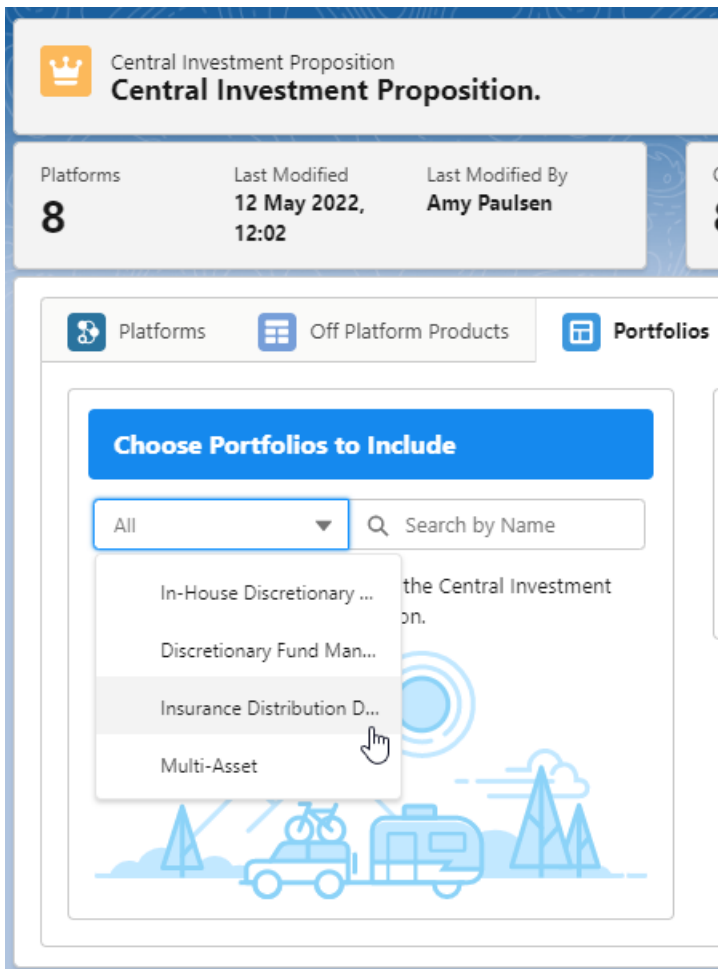
Last Modified on 26/05/2022 12:44 pm BST

Add Portfolios to the **Central Investment Proposition** through the **Portfolios** tab:

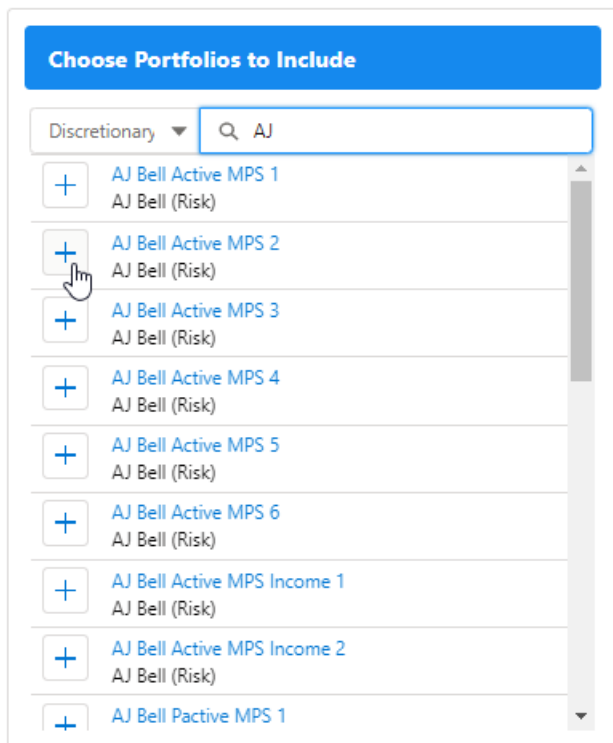
The screenshot displays the 'Central Investment Proposition' interface. At the top, there are two summary cards: 'Platforms' with a count of 8, last modified on 12 May 2022 at 12:02 by Amy Paulsen, and 'Off Platform' with a count of 8, last modified on 12 May 2022 at 12:07 by Amy Paulsen. Below these is a navigation bar with tabs for 'Platforms', 'Off Platform Products', 'Portfolios', 'Fund Lists', and 'Segments'. The 'Portfolios' tab is active, showing a 'Choose Off Platform Products to Include' button and a search box with 'All' selected. To the right, there is a 'Products Selected' button and an 'Investment Products' section. The bottom part of the screenshot shows a more detailed view of the 'Portfolios' tab, with a 'Choose Portfolios to Include' button and a search box with 'Search by Name' entered. Below this is a table titled 'Investment Portfolios' with columns for 'Portfolio Name', 'Promoter', 'Portfolio Type', 'Reason', and 'Remove'. The table is currently empty.

Use the search box on the left of the screen to find Portfolios you would like to add to the CIP.

The all dropdown can be used to set what type of portfolio you would like to search for:



Search and select the + to add to the **Portfolios Selected** area:



Platforms Off Platform Products Portfolios Fund Lists Segments

Choose Portfolios to Include

Discretionary Q AJ

- + AJ Bell Active MPS 1
AJ Bell (Risk)
- AJ Bell Active MPS 2
AJ Bell (Risk)
- + AJ Bell Active MPS 3
AJ Bell (Risk)
- + AJ Bell Active MPS 4
AJ Bell (Risk)
- + AJ Bell Active MPS 5
AJ Bell (Risk)
- + AJ Bell Active MPS 6
AJ Bell (Risk)
- + AJ Bell Active MPS Income 1
AJ Bell (Risk)
- + AJ Bell Active MPS Income 2
AJ Bell (Risk)
- + AJ Bell Pactive MPS 1

Portfolios Selected

Filter by Type Search by Name

Portfolio Name	Promoter	Portfolio Type	Reason	Remove
1 AJ Bell Active MPS 2	AJ Bell (Risk)	MPS		

Remove portfolios using the bin icon:

Portfolios Selected

Investment Portfolios Filter by Type Search by Name

Portfolio Name	Promoter	Portfolio Type	Reason	Remove
1 AJ Bell Active MPS 2	AJ Bell (Risk)	MPS		

Remove portfolio from CIP

For more information on configuring your CIP, see article [Central Investment Proposition - Adding Fund Lists](#)