

# Central Investment Proposition - Adding On Platforms to a Segment

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After creating the segment, On platform products will be the first screen to complete.

Click on the On platform product you would like to add to the segment:

The screenshot shows the 'Platforms' interface with a navigation bar at the top containing 'Platforms', 'Off Platform Products', 'Portfolios', 'Fund Lists', 'Adviser Fees', and 'Assign Users'. Below the navigation bar is a blue header 'Add / Remove Platforms in CIP from Segment'. On the left, an orange box titled 'What's shown here' contains instructions: 'Select which Platforms should be included in the Segment. Including Platforms will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.' The main area is divided into two columns: 'Platforms Available in CIP' and 'Platforms in Segment'. The 'Platforms Available in CIP' column contains a list with 'Aegon Platform' and 'AEGON Retirement Choices'. A mouse cursor is hovering over 'Aegon Platform', and a right-pointing arrow is visible next to it.

Once selected, click the arrow to move the platform over to **Platforms in Segment**

This screenshot is identical to the previous one, but the 'Aegon Platform' item in the 'Platforms Available in CIP' list is now highlighted with a dark blue background. The right-pointing arrow next to it is now a hand cursor, indicating it is being clicked.

This screenshot shows the final state where 'Aegon Platform' has been moved to the 'Platforms in Segment' list. The 'Aegon Platform' item in the 'Platforms Available in CIP' list is no longer highlighted. The 'Platforms in Segment' list now contains 'Aegon Platform'. A right-pointing arrow is visible next to 'Aegon Platform' in the 'Platforms in Segment' list, indicating it can be removed.

Multiple platforms can be moved at once. Click on the first platform, type CTRL A to select all the platforms in the list.

Platforms | Off Platform Products | Portfolios | Fund Lists | Adviser Fees | Assign Users

**What's shown here**

Select which Platforms should be included in the Segment.  
Including Platforms will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.

**Add / Remove Platforms in CIP from Segment**

Platforms Available in CIP

- 7IM Platform
- abrdn Wrap
- Advance by Embark Platform
- Aegon Platform
- AEGON Retirement Choices
- AJ Bell Investcentre

Platforms in Segment

If you don't wish to move all platforms, click the first platform, hold CTRL and click the remaining platforms you would like to move.

Platforms | Off Platform Products | Portfolios | Fund Lists | Adviser Fees | Assign Users

**What's shown here**

Select which Platforms should be included in the Segment.  
Including Platforms will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.

**Add / Remove Platforms in CIP from Segment**

Platforms Available in CIP

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- abrdn Wrap
- Advance by Embark Platform
- Aegon Platform
- AEGON Retirement Choices
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Platforms in Segment

Once done, move onto Central Investment Proposition - Adding Off Platforms to a Segment