Switching - Research Screen
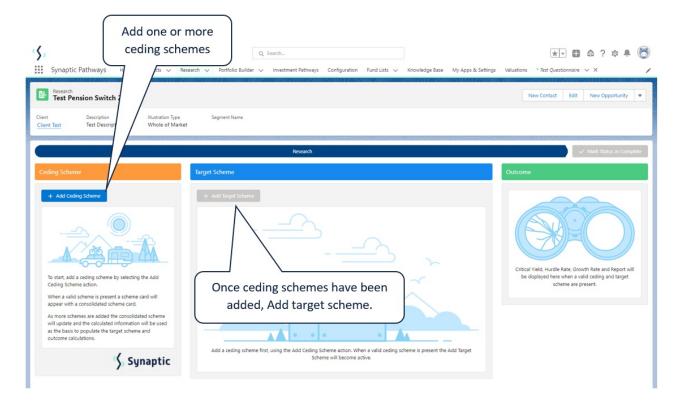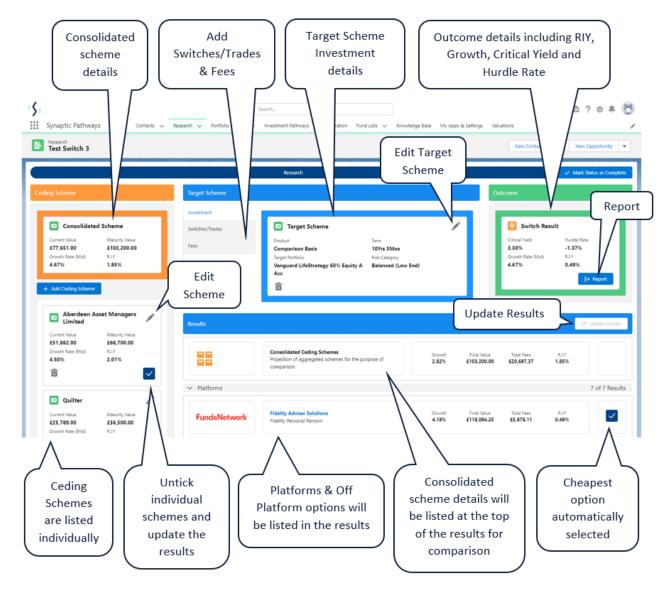
Last Modified on 23/04/2024 2:24 pm BST

This article is a continuation of Switching - Creating within a client record

Consolidated scheme details

Add Switches/Trades & Fees

Target Scheme Investment details

Outcome details including RIY, Growth, Critical Yield and Hurdle Rate

Edit Target Scheme

Report

Edit Scheme

Update Results

Ceding Schemes are listed individually

Untick individual schemes and update the results

Platforms & Off Platform options will be listed in the results

Consolidated scheme details will be listed at the top of the results for comparison

Cheapest option automatically selected

For further information on Switch research, see article Switching - Add Ceding Scheme