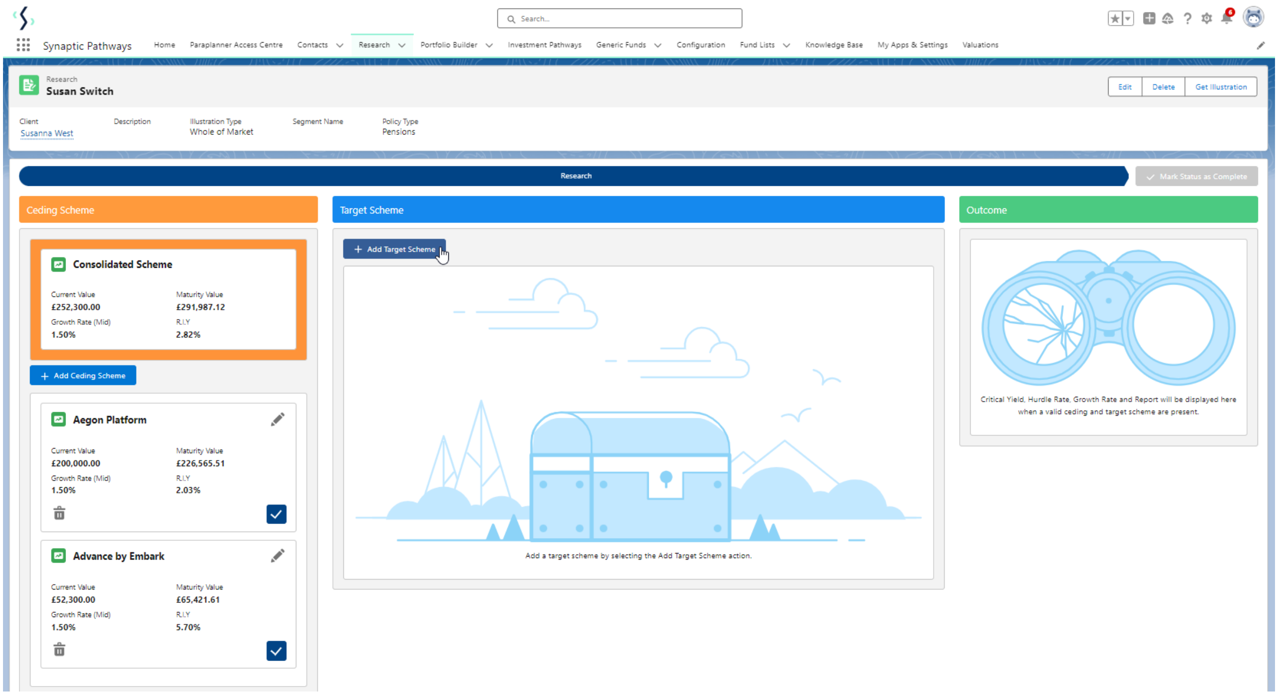
Switching - Add Target Scheme

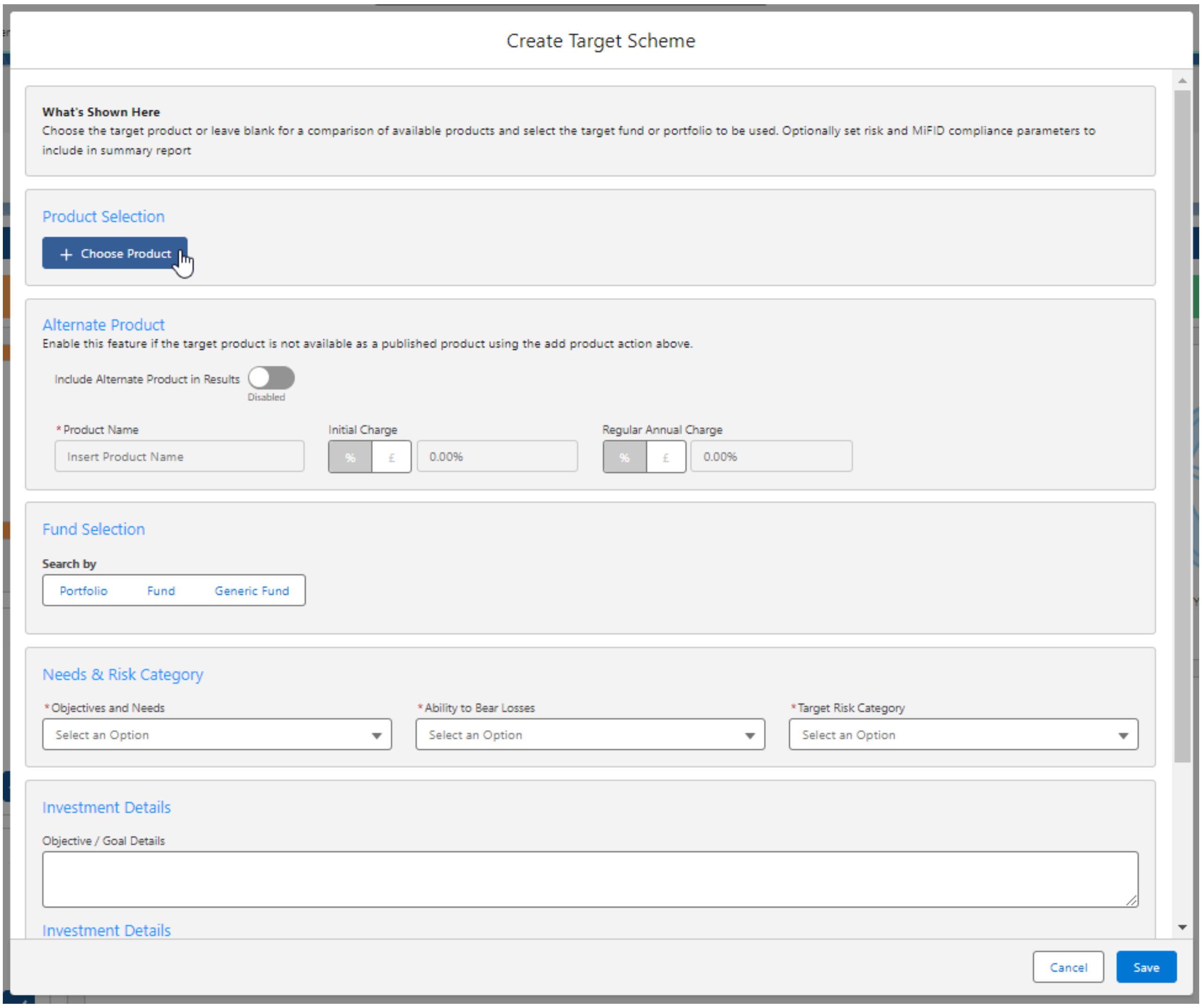
Last Modified on 13/02/2024 3:34 pm GMT

This article is a continuation of Switching - Add Ceding Scheme

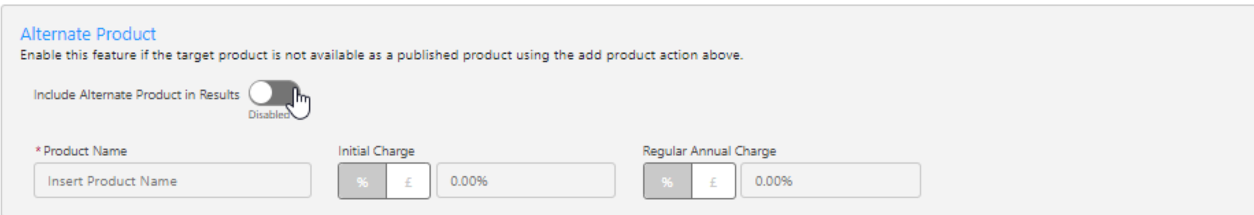
Add a Target Scheme through the + **Add Target Scheme** button:

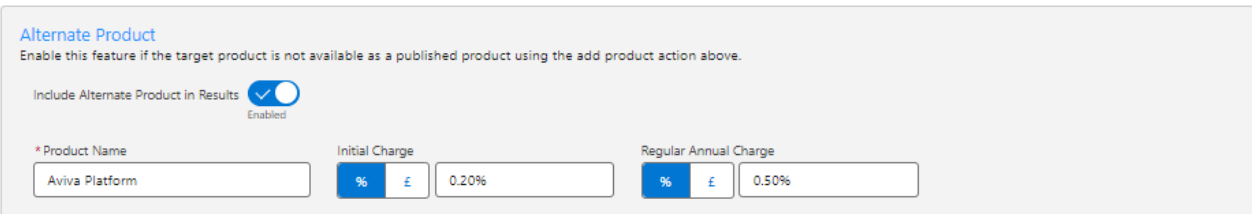


Choose a target product or leave blank for a comparison of available products. In this example we will leave the product blank.



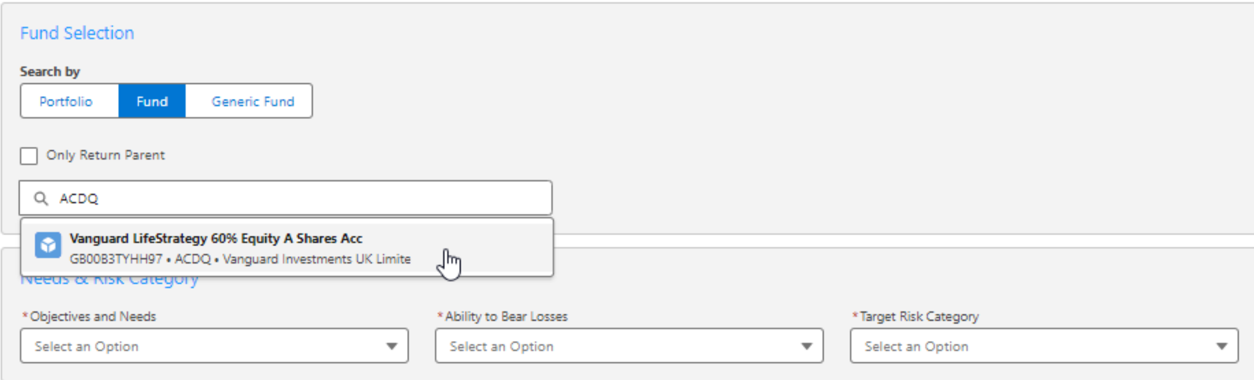
If the product selected is not available, Select **Include Alternate Product in Results:**



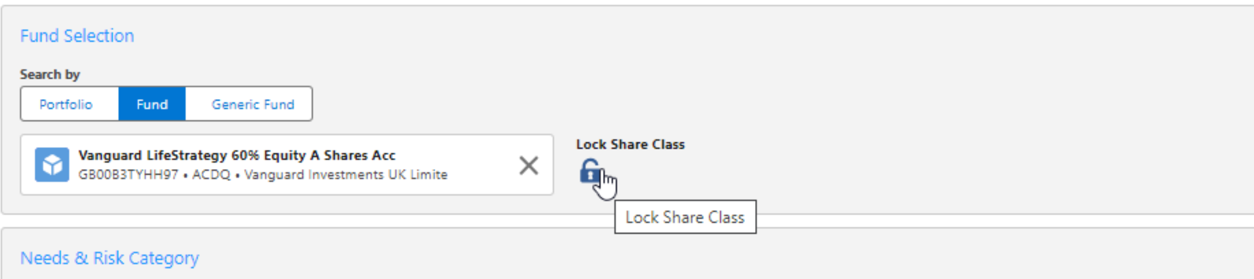


Select either a **Portfolio, Fund** or **Generic Fund:**

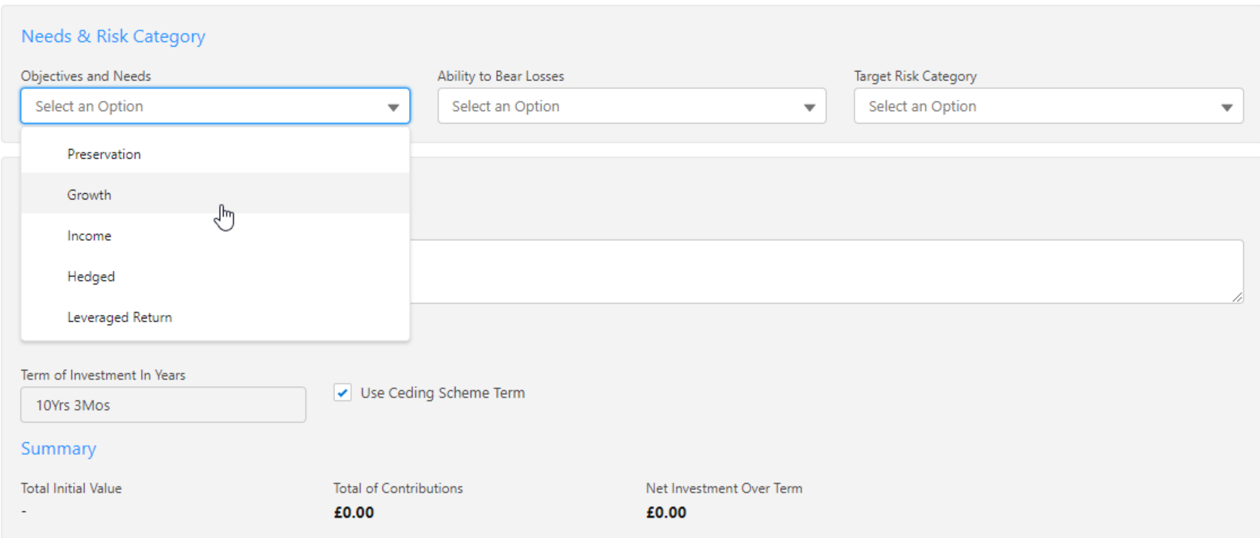
In this example, we will select a fund. Tick **Only Return Parent** if you would like the fund search to only return Parent funds.

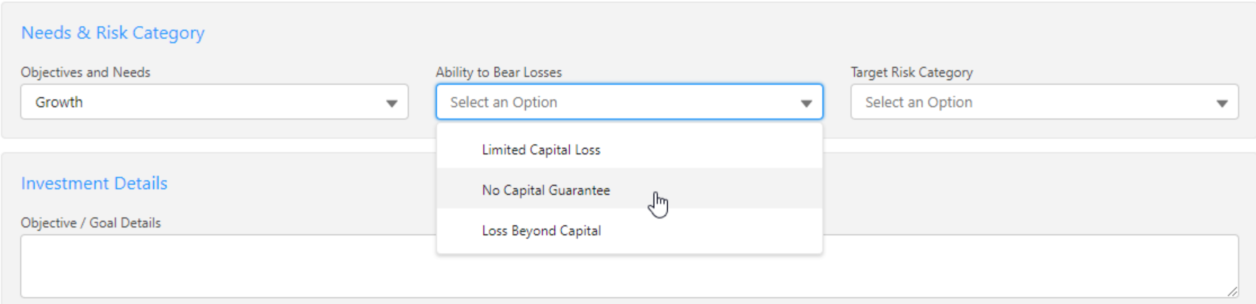


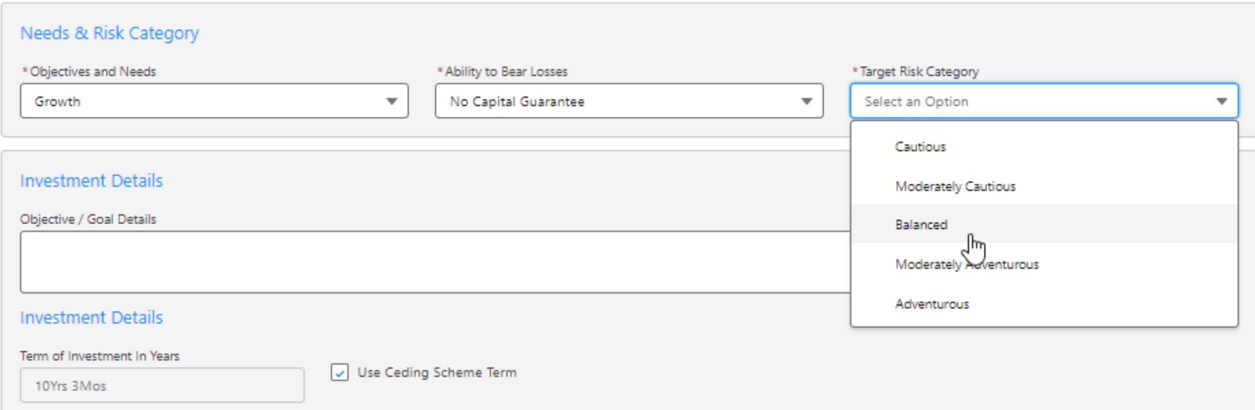
Tick the **Lock Share Class** button if you would like the exact fund selected to be used in the research. If left unselected, the system will find the cheapest share class available:



Complete the Needs & Risk Category area:

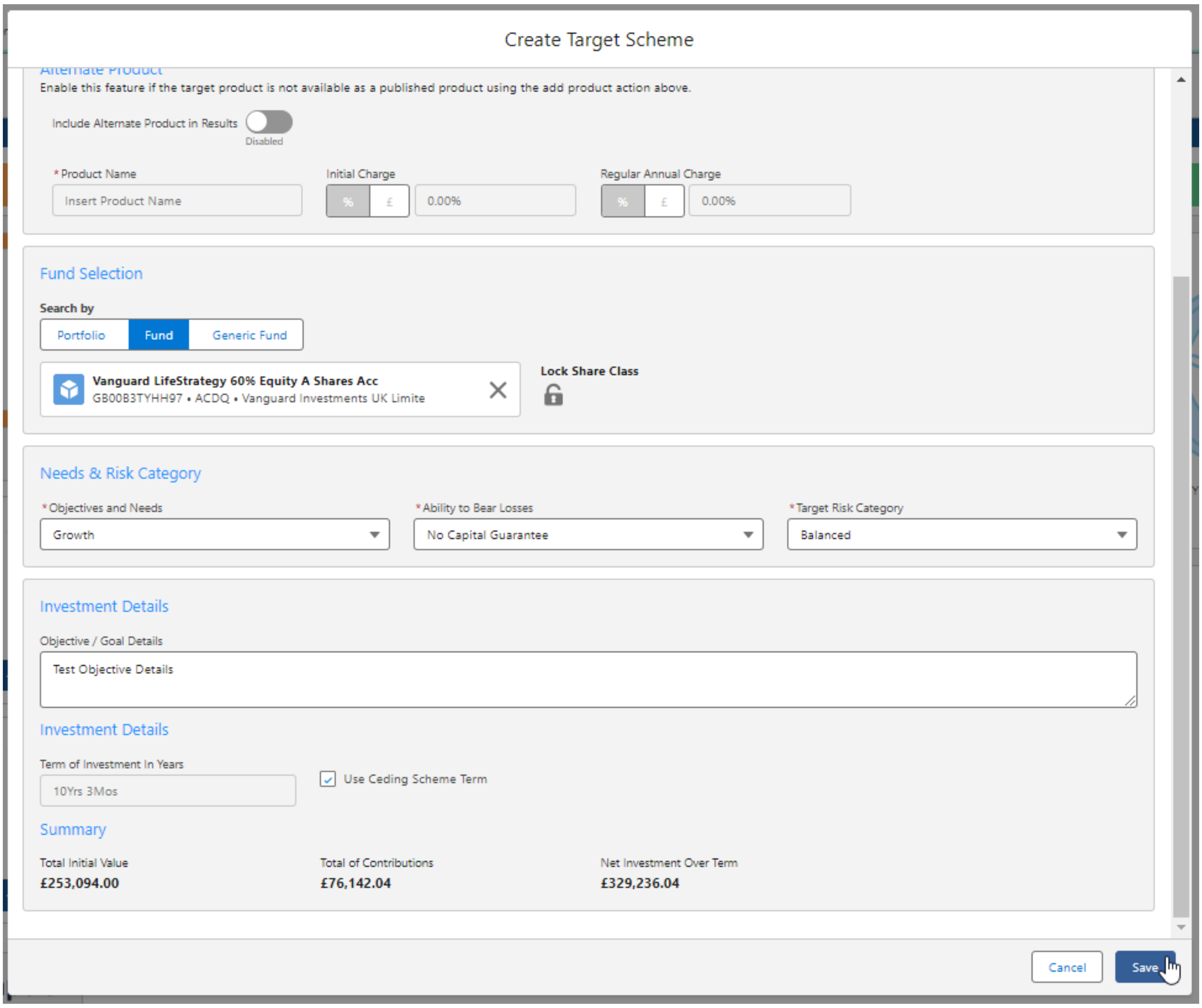




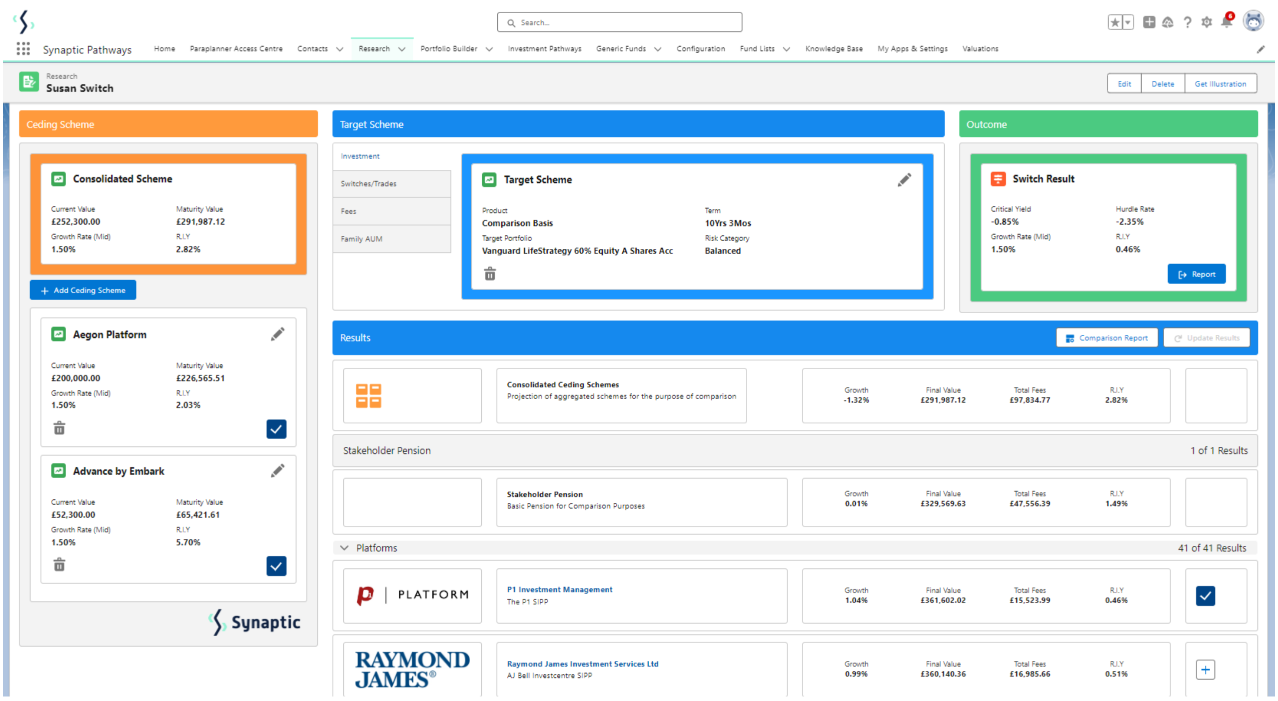


Summary details are calculated using the Transfer Value in the ceding scheme/s details.

Once complete, **Save**



This will populate the Target Scheme summary information at the top of the screen and will return a list of available products.



For further information on Switch research, see article Switching - Results Screen