Central Investment Proposition -Adding Portfolios

Last Modified on 13/02/2024 3:35 pm GMT

This article is a continuation of Central Investment Proposition - Adding Off Platform Products

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

Central Investment Proposition Central Investment Proposition	
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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:

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Platforms 9	Last Modified Last Modified By 24 Nov 2023, 12:06 Amy Paulsen
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Search and select the + to add to the **Portfolios Selected** area:

Choose Portfolios to Include
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+ AJ Bell Active MPS 1 AJ Bell (Risk)
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Remove portfolios using the bin icon:

Portfolios Selected				
Investment Portfolios	Filter by Type		Q Search by Name	
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1 AJ Bell Active MPS 2	AJ Bell (Risk)	MPS		Jm
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For more information on configuring your CIP, see article Central Investment Proposition - Adding Fund Lists