

# Central Investment Proposition - Adding Off Platform Products

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

For details on how to Create a Central Investment Proposition, see article [Central Investment Proposition - Adding On Platforms to a Segment](#)

We have created our CIP, we can now add off platforms to include in the Central Investment Proposition.

The screenshot displays the Synaptic Pathways interface for a Central Investment Proposition. The top navigation bar includes a search field and various utility icons. The main header shows the proposition name 'Central Investment Proposition' with 'Report' and 'Duplicate' buttons. Below this, a summary bar indicates 9 Platforms, 0 Off Platform Products, 0 Portfolios, and 0 Segments. The 'Off Platform Products' tab is active, showing a list of platforms to include on the left and a table of selected investment products on the right.

**Choose Platforms to Include**

- 7IM Platform
- Aegon Platform
- AEGON Retirement Choices
- AJ Bell Investcentre
- AJ Bell Investcentre (RIA)
- Elevate
- Fidelity
- Fidelity (No Investor Fee)
- James Hay Partnership Wrap

**On Platform Product Selected**

**Investment Platforms**

▼ AJ Bell Investcentre

+ Add Reason for Inclusion

	Product Name	Provider Name	Product Type	Product Basis	Included	Reason
1	AJ Bell Investcentre Income Drawdown	AJ Bell (Investcentre)	Income Drawdown	Income Drawdown	<input checked="" type="checkbox"/>	
2	AJ Bell Investcentre Investment ISA	AJ Bell (Investcentre)	Individual Savings Accounts	ISA	<input checked="" type="checkbox"/>	
3	AJ Bell Investcentre SIPP	AJ Bell (Investcentre)	Self Invested Personal Pension	Full	<input checked="" type="checkbox"/>	

> Aegon Platform

> Aviva Wrap

> Elevate

> Fidelity

> Morningstar Wealth Administration Limited

> Novia Wealth Management Service

Click into the **Off Platforms Products** tab:

Central Investment Proposition  
**Central Investment Proposition**

Platforms: 9 | Last Modified: 24 Nov 2023, 12:06 | Last Modified By: Amy Paulsen | Off Platform: 0 | Last Modified: | Last Modified By: | Portfolios: 0

Navigation: Platforms | Off Platform Products | Portfolios | Fund Lists | Segments

### Choose Platforms to Include

- 7IM Platform
- Aegon Platform
- AEGON Retirement Choices
- AJ Bell Investcentre
- AJ Bell Investcentre (RIA)
- Elevate

### On Platform Product Selected

Investment Platforms

▼ AJ Bell Investcentre

[+ Add Reason for Inclusion](#)

	Product Name	Provider Name
1	AJ Bell Investcentre Income Drawdown	AJ Bell (Investcentre)
2	AJ Bell Investcentre Investment ISA	AJ Bell (Investcentre)
3	AJ Bell Investcentre SIPP	AJ Bell (Investcentre)

The search box can be found on the left side of the screen.

The All dropdown allows you to select the product type you would like to search for:

Central Investment Proposition  
**Central Investment Proposition**

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Navigation: Platforms | Off Platform Products | Portfolios

### Choose Off Platform Products to Include

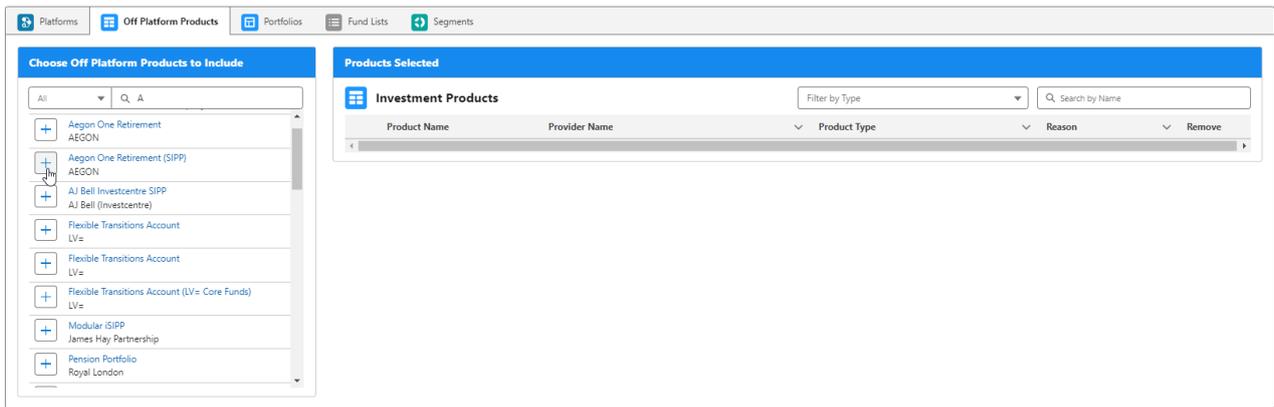
All ▼

Search by Name

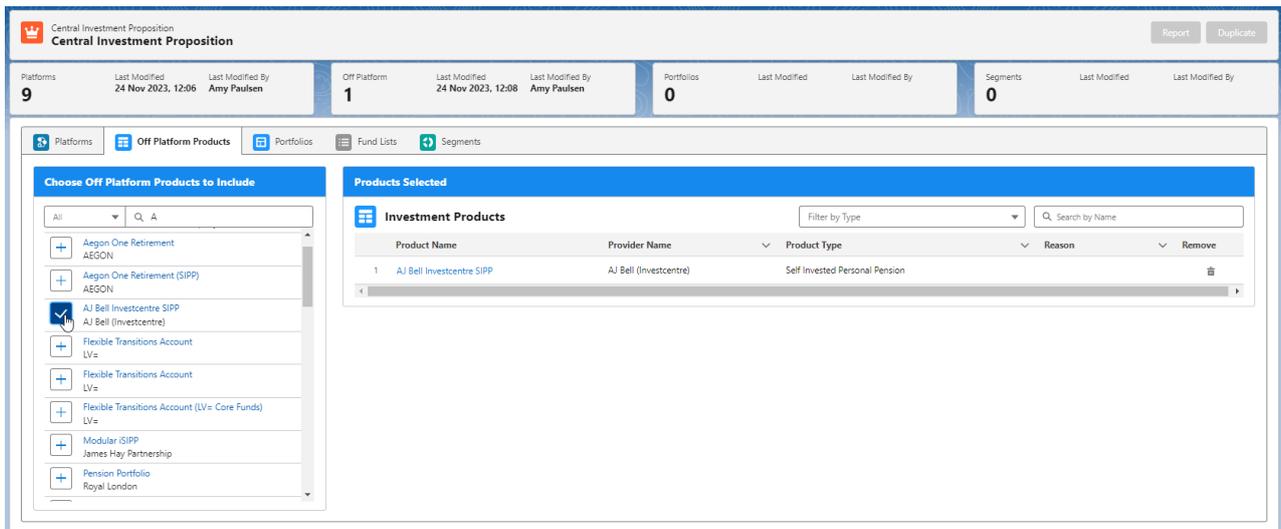
include in the Central Investment Proposition.

- All
- Personal Pension (Fully I...
- Investment Bond
- Offshore Bonds
- Individual Savings Acco...
- Self Invested Personal P...
- Income Drawdown

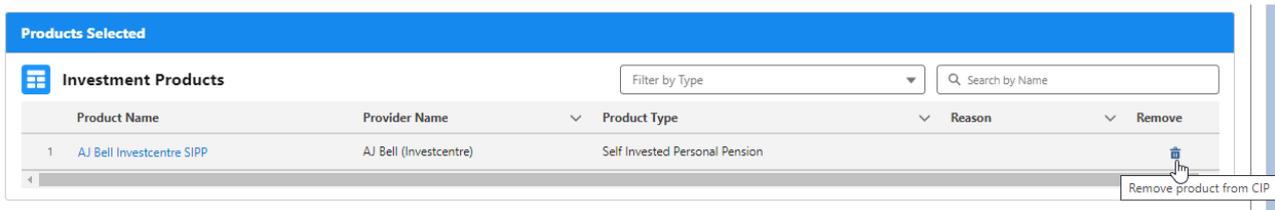
Once selected, use the Search box:



The Off Platform Product selected will display within the Products Selected area:



Products can be removed using the bin icon on the right side of the screen:



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