Central Investment Proposition -Creating Segments

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

This article is a continuation of Central Investment Proposition - Adding Fund Lists

Creating segments within the Central Investment Proposition allows you to use the on & off platforms, portfolios and fund lists added to the CIP and allocate them to a segment. You are able to set Adviser Fees against each segment and set which users are assigned the segments.

Users that will be using the CIP & Segments, will need to be assigned, otherwise the research will be Whole of Market only.

In the article below, we will be allocating products, portfolios and a fund list to a segment and set the advider fees. The user will then be assigned to ensure they are able to select the segment at the beginning of the research.

Platforms 📰 Off Platform Products 🖬 Portfolios	Fund Lists Segments
What's Shown Here	Fund List(s) Selected
Select the Fund List(s) to assign to the Central Investment Proposition. Fund List(s) can be assigned to Segments to ensure funds used in illustrations or regular reviews meet your governance requirements.	Available Fund Lists

Portfolios, Fur and Assign U	Platform Products, nd Lists, Adviser Fees sers to the segment	tion Fund Lists 🗸 Knowledge Base My Apps & Settings * Central	Investment Propor_ v × °More v ✓
	DIf Platform Last Modified Last Modified By 13 21 Dec 2021, Amy Paulsen 11:94 Fund Lists 1 Segments	Portfolios Last Modified Last Modified By 9 12:06 Amy Paulsen 2	nts Last Modified Last Modified By 05 May 2022, Amy Paulsen 12-07
Add New Segment 1	Segment Details - Test Segment 1 Platforms Image: Comparison of the products 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 (Riv), Ex-ante and Ex-post reviews.	ics Fund Lists Adviser Fees Assign Users Add / Remove Platforms in CIP from Segment Advance by Embark Platform Aegon Platform Aegon Platform AEGON Retirement Choices AJ Bell investcentre	in Segment
Segment Details – Select, Edit or Delete		and move items over cate to the segment	

Click the + next to Add New Segment

Add New Segment	e
Select + to add a new Segment, then you can Off Platform Products, Portfolios, Adviser Fe	

Platforms E Off Platform Products E Portfolios	E Fund Lists Segments
Add New Segment	
A Select + to add a new Segment, then you can add Platforms, Off Platform Products, Portfolios, Adviser Fees and Users	dd Segment to CIP

Complete details of the Segment

Portfolios	E Fund Lists	Segments					×
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Target Market S	Statement for PROD Co	mpliance					
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Add Segment							
* Segment Name Segment 1 Test	* Target Investor Type Retail	 Knowledge & Experience Type ■ Basic Investor 					
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Knowledge & Experience Basic Investor				Select which Platforms should be included in the Segment. Including Platforms will allow them to be used to provide				CIP			Platforms in Segment		
Edit			illustrations for reduction in yield (RIY), Ex-ante and Ex-post			Aegon Platform	Choices						
							AJ Bell Investcentre	2		•			
							Aviva Wrap Elevate						
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This article is a continuation of Central Investment Proposition - Adding On Platforms to a Segment