

# Central Investment Proposition - Creating Segments

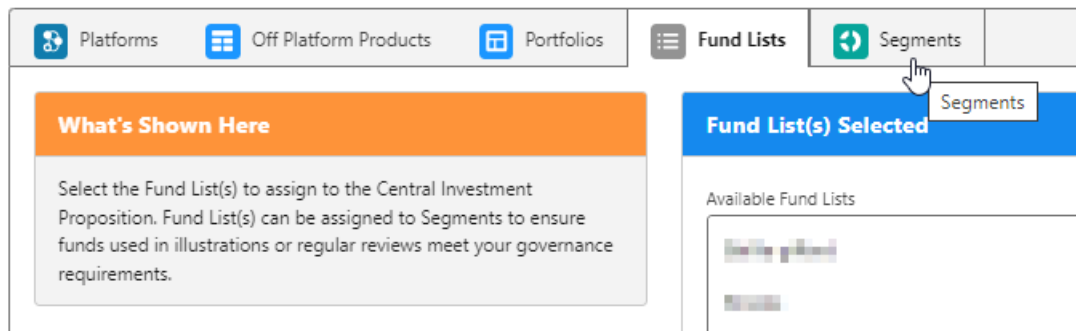
Last Modified on 13/02/2024 3:35 pm GMT

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 adviser fees. The user will then be assigned to ensure they are able to select the segment at the beginning of the research.



Add On/Off Platform Products, Portfolios, Fund Lists, Adviser Fees and Assign Users to the segment

Segment Details – Select, Edit or Delete

Select and move items over to allocate to the segment

Click the + next to **Add New Segment**

Complete details of the Segment

Portfolios Fund Lists Segments

### Add Segment

\*Segment Name: Segment 1 Test

\*Target Investor Type: --None--

\*Knowledge & Experience Type: --None--

Target Market Statement for PROD Compliance

Cancel Save

## Save

### Add Segment

\*Segment Name: Segment 1 Test



\*Target Investor Type: Retail

\*Knowledge & Experience Type: Basic Investor

Target Market Statement for PROD Compliance

Target Market Statement Text

Cancel Save

 **Success!**  
Segment successfully added to the CIP 

Central Investment Proposition  
Central Investment Proposition. Report Duplicate

Platforms 8	Last Modified 12 May 2022, 12:02	Last Modified By Amy Paulsen	Off Platform 8	Last Modified 12 May 2022, 12:07	Last Modified By Amy Paulsen	Portfolios 1	Last Modified 12 May 2022, 12:09	Last Modified By Amy Paulsen	Segments 1	Last Modified 12 May 2022, 12:33	Last Modified By Amy Paulsen
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Platforms Off Platform Products Portfolios Fund Lists Segments

#### Add New Segment

Segment Details - Segment 1 Test.

Platforms Off Platform Products Portfolios Fund Lists Adviser Fees Assign Users

**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 (RIY), Ex-ante and Ex-post reviews.

**Add / Remove Platforms in CIP from Segment**

Platforms Available in CIP

- Aegon Platform
- AEGON Retirement Choices
- AJ Bell Investcentre
- Aviva Wrap
- Elevate
- Embark Platform

Platforms in Segment

This article is a continuation of [Central Investment Proposition - Adding On Platforms to a Segment](#)