Risk Illustrations - Pathway Selection

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This article is a continuation of - Illustrations - Investment Details

In the Pathway Selection screen, you can either Select an Investment Pathway Fund or Portfolio or Use the Clients Default Attitude to Risk.

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Search by Portfolio	Fund				
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If you would like to use the client's risk rating rather than a fund or portfolio, click 'Use Client's Default Risk Category'. This will grey out the portfolio search box and the 'Target Pathway' & 'Target Risk Category' will populate on the top right:

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Please note - If the 'Use Client's Default Risk Category' field is greyed out, a risk questionnaire has not been completed for the client or has not been set to default. See article - Why is the 'Use Client's Default Risk Category' greyed out on the Pathway Selection screen?

If you would like to use a fund or portfolio in the illustration, leave the 'Use the Client's Default Risk Category' disabled and find a fund or portfolio in the Fund Selection area.

Select either Portfolio or Fund:



Portfolio

You are able to search for any Model, Bespoke or In-House Discretionary Portfolios you have created, as well as any portfolio we have available (this includes Discretionary Fund Managers, Insurance Distributions Directives and Multi-Assets):

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You can narrow the results using the drop down & advanced search options:

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Advanced search will give you the option of searching by Promoter, Range, Risk Category and Portfolio Basis:

Fund Selection		
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For this example, I will be selecting a Model Portfolio I have created in Portfolio Builder:

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Once selected, click 'Continue to Next Step' to the 'Charges & Fees' section:

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For further information on the 'Charges & Fees' screen, see article Illustrations - Charges & Fees