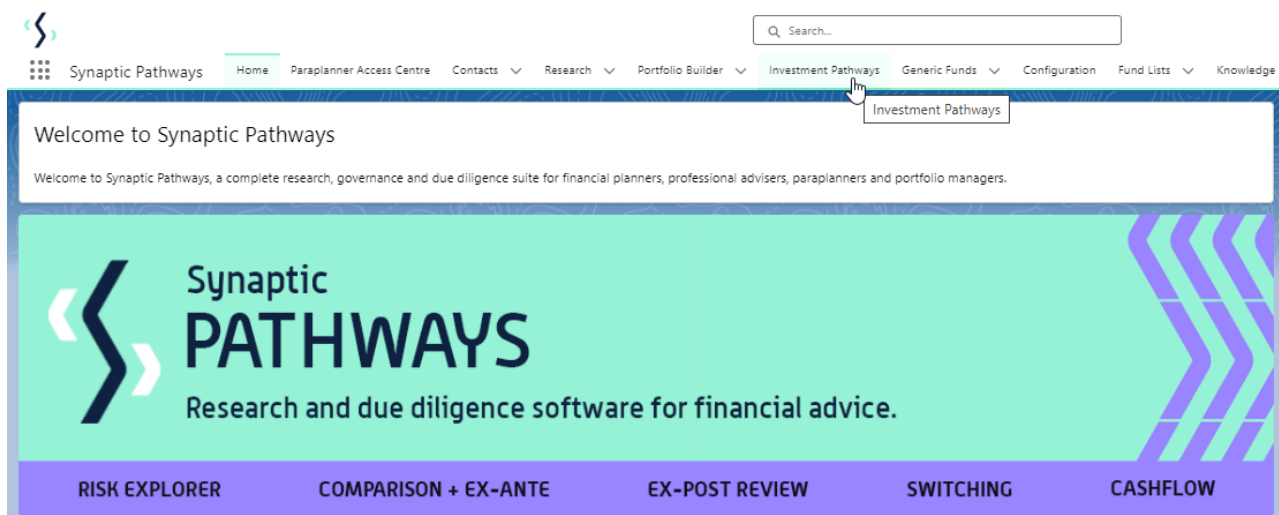


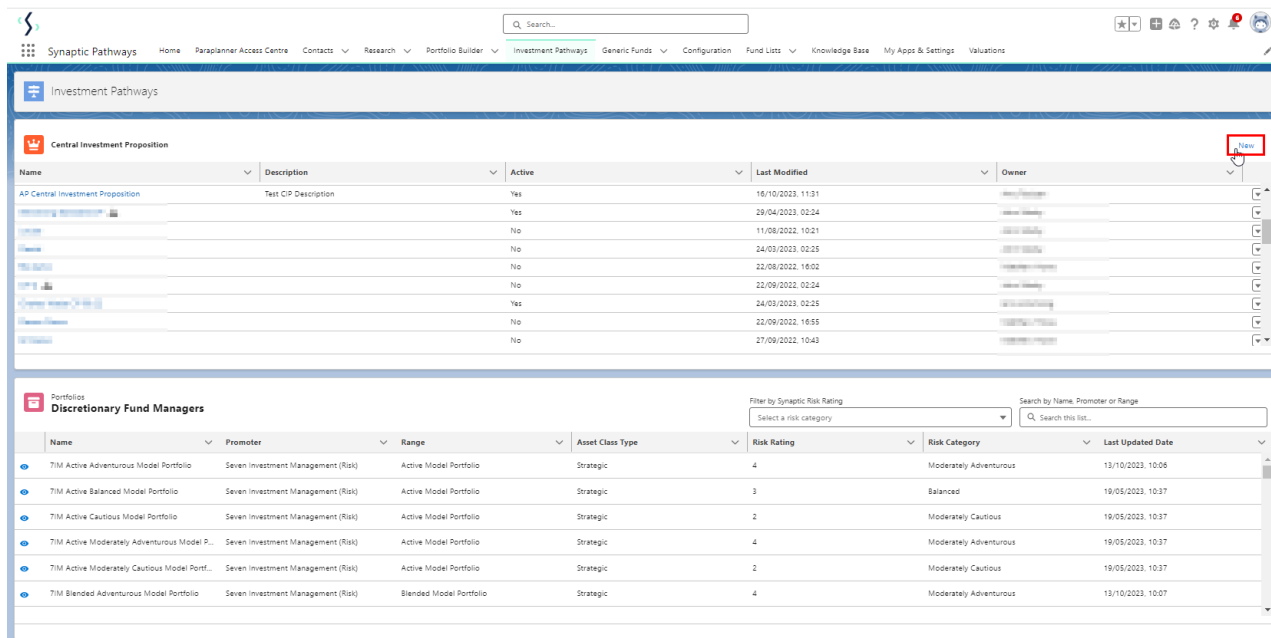
How do I set a Central Investment Proposition to active?

16/06/2025 3:46 pm BST

Navigate to Investment Pathways:



When creating a Central Investment Proposition for the first time, you will get the choice of making it Active upfront:



Active

Last Modified

New Central Investment Proposition(CIP)

* CIP Name

Test CIP

CIP Description

Test CIP Description

Mark Active

☒

Cancel

Save

If you would prefer to work on the CIP before marking it as active, you can navigate back to Investment Pathways once you have completed the setup.

In the Central Investment Proposition area, find the record you have created.

Name	Description	Active	Last Modified	Owner
Central Investment Proposition Sep23	Test CIP	No	20/09/2023, 09:48	John Doe
Test CIP	Test CIP Description	Yes	18/10/2023, 12:47	John Doe
		No	04/10/2022, 13:53	John Doe
		No	17/12/2022, 02:24	John Doe
		No	24/03/2023, 02:25	John Doe
		No	24/03/2023, 02:25	John Doe
		No	24/03/2023, 02:25	John Doe
		No	25/07/2022, 12:47	John Doe

On the right side of the record, click into the drop down arrow & **Edit**:

Name	Description	Active	Last Modified	Owner
Central Investment Proposition Sep23	Test CIP	No	20/09/2023, 09:48	John Doe
Test CIP	Test CIP Description	Yes	18/10/2023, 12:47	John Doe
		No	04/10/2022, 13:53	John Doe
		No	17/12/2022, 02:24	John Doe
		No	24/03/2023, 02:25	John Doe
		No	24/03/2023, 02:25	John Doe
		No	24/03/2023, 02:25	John Doe
		No	25/07/2022, 12:47	John Doe

Tick the **Mark Active** box:

5/2/2025 15:25

Edit Central Investment Proposition(CIP)

* CIP Name

Test CIP

CIP Description

Test CIP Description

Mark Active

☐

Cancel Save

Range Asset Class Type Risk Rating

Save:

5/2/2025 15:25

Edit Central Investment Proposition(CIP)

* CIP Name

Test CIP

CIP Description

Test CIP Description

Mark Active

☒

Cancel Save

Range Asset Class Type Risk Rating

Once saved, a success message will appear:

