Comparison & Ex-Ante using a CIP - Creating research within a client record

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This article explains how to create Comparison & Ex-Ante research, using a Central Investment Proposition. If you have not setup the CIP, this can be done in the Investment Pathways tab. For more information on how to create & build your CIP, see articles here.

Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create a comparison with Ex-ante scenario within a contact record, either:

Search for the client in the top search bar:



Alternatively, find the client within the Contacts tab:



Select the client from the contact list:

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	ien Smith				test@test.com	apaul	
Ca	asey Cooper			0777777779	steven.r.ferguson@googlemail.com	apaul	
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Click **New** within the Research area:

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Related Details Medical Holdings Related Contacts Family AUM [2] We found no potential duplicates of this Contact. Example of the contact. Example of the contact. Example of the contact.	Recent Items (3) Alt Guestionnaire Conset Tet Client
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If you would like to run a comparison with an ex-ante report, select the first option. If you wish to create an ex-ante report without the comparison, select the second option:

	Phore
	New Research
Select a record type	
۲	Comparison with Ex-ante Select this option to compare platforms and products BEFORE executing an Illustration as a single or multiple wrapper report
0	Ex-ante (Pre-Sales) Select this option to create an Ex-ante (pre-sales) illustration for a single product
¢ O	Switch Select this option to consolidate one or more existing policies (ceding schemes) to a new single scheme.
-volore Vathuraire	Cancel Next

The client field will automatically be completed

New Research: Comparison with Ex-an	ite
	* = Required Information
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*Client	
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Note - Client field will not be completed if research has been created through the Research tab or homepage.

Complete the remaining fields & Save:

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This will add the research to the Research list. Click into the Illustration name to open:

Please note: You may have to view all if it is not listed on the details page.

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8 Test Switch 2904	Switch	Test Desc Text	30/04/2022	Amy Paulsen	
9 Test Illustration Apr22	Comparison with Ex-ante	Test Description Text	30/05/2022	Amy Paulsen	T

As we have configured a Central Investment Strategy, we will need to choose whether we use a segment or conduct Whole of Market research:

Please note - If the whole of market button cannot be enabled, you do not have the permissions to overwrite the segment/s assigned to you in the CIP. Your Administrator can assign this for you. Article **Pathways Administrator - Assigning Whole of Market permissions** explains how this is applied to your account.

	Cho	ose		
Select a segment from the list to use a products and funds.	s the basis for this illustration	OR enable Whole of Ma	rket 'mode' to select	from all available
* Choose Segment				
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<pre>products and funds. *Choose Segment Select an Option Segment 1</pre>	e as the basis for this illustrat	ion OR enable Whole of		elect from all available

Once the segment is selected, **Save**

This will take you directly into the research:

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Client Description Illustration Type Segment N Susanna West Test Description Segment Segment				
Research	Review	Client Check-In	Report	✓ Mark Status as Complete
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The segment will be displayed at the top of the screen:

