Central Investment Proposition -Adding Off Platform Products

Last Modified on 24/11/2023 12:09 pm GMT

For details on how to Create a Central Investment Proposition, see article Central Investment Proposition - Adding On Platforms to a Segment

We have created our CIP, we can now add off platforms to include in the Central Investment Proposition.

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+ James Hay Partnership Wrap -	> Elevate
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Click into the Off Platforms Products tab:

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The search box can be found on the left side of the screen.

The All dropdown allows you to select the product type you would like to search for:



Once selected, use the Search box:

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For more information on configuring your CIP, see article Central Investment Proposition - Adding Portfolios