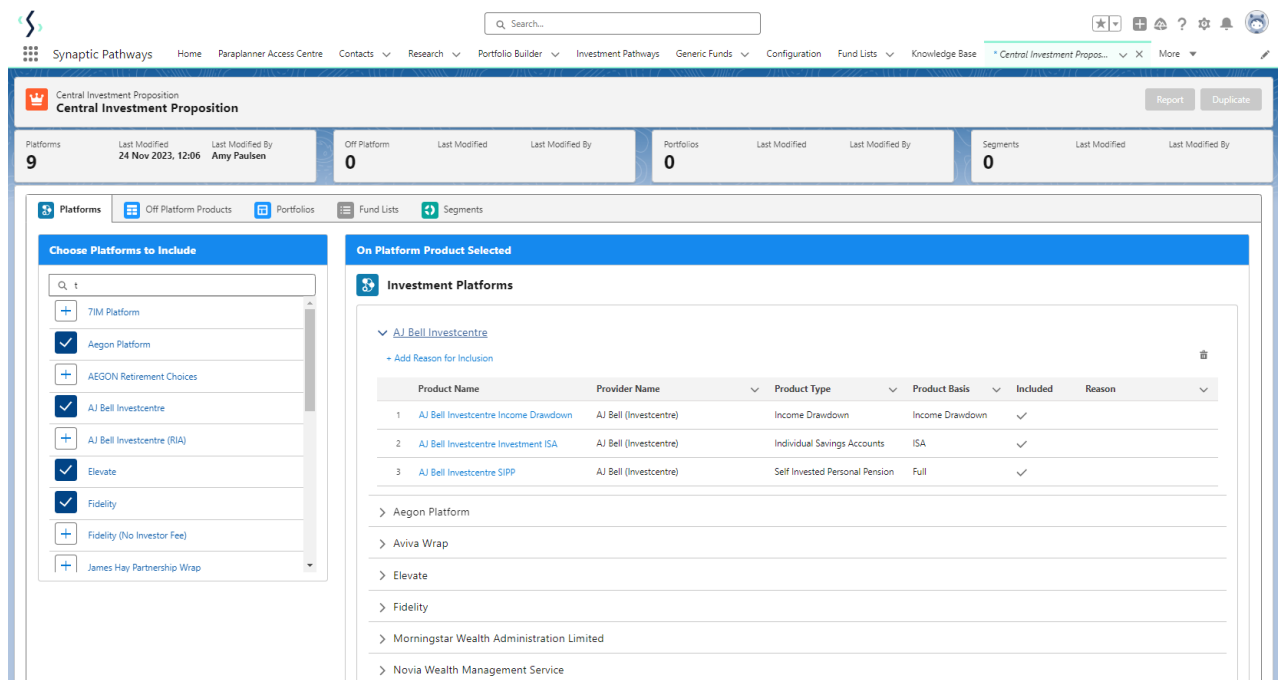


# Central Investment Proposition - Adding Off Platform Products

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.



The screenshot displays the Synaptic Pathways interface for configuring a Central Investment Proposition. The top navigation bar includes a search bar and various menu items. The main content area is divided into two primary sections:

- Choose Platforms to Include:** A list of platforms with checkboxes for selection. The selected platforms are Aegon Platform, AJ Bell Investcentre, Elevate, and Fidelity.
- On Platform Product Selected:** A section titled "Investment Platforms" showing a table of products for the selected "AJ Bell Investcentre" platform.

Product Name	Provider Name	Product Type	Product Basis	Included	Reason
1 AJ Bell Investcentre Income Drawdown	AJ Bell (Investcentre)	Income Drawdown	Income Drawdown	✓	
2 AJ Bell Investcentre Investment ISA	AJ Bell (Investcentre)	Individual Savings Accounts	ISA	✓	
3 AJ Bell Investcentre SIPP	AJ Bell (Investcentre)	Self Invested Personal Pension	Full	✓	

Click into the **Off Platforms Products** tab:

Central Investment Proposition  
**Central Investment Proposition**

Platforms: 9 | Last Modified: 24 Nov 2023, 12:06 | Last Modified By: Amy Paulsen | Off Platform: 0 | Last Modified: | Last Modified By: | Portfolios: 0

Navigation: Platforms | Off Platform Products | Portfolios | Fund Lists | Segments

**Choose Platforms to Include**

Search: t

- 7IM Platform
- Aegon Platform
- AEGON Retirement Choices
- AJ Bell Investcentre
- AJ Bell Investcentre (RIA)
- Elevate

**On Platform Product Selected**

Investment Platforms

▼ AJ Bell Investcentre

+ Add Reason for Inclusion

	Product Name	Provider Name
1	AJ Bell Investcentre Income Drawdown	AJ Bell (Investcentre)
2	AJ Bell Investcentre Investment ISA	AJ Bell (Investcentre)
3	AJ Bell Investcentre SIPP	AJ Bell (Investcentre)

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:

Central Investment Proposition  
**Central Investment Proposition**

Platforms: 9 | Last Modified: 24 Nov 2023, 12:06 | Last Modified By: Amy Paulsen

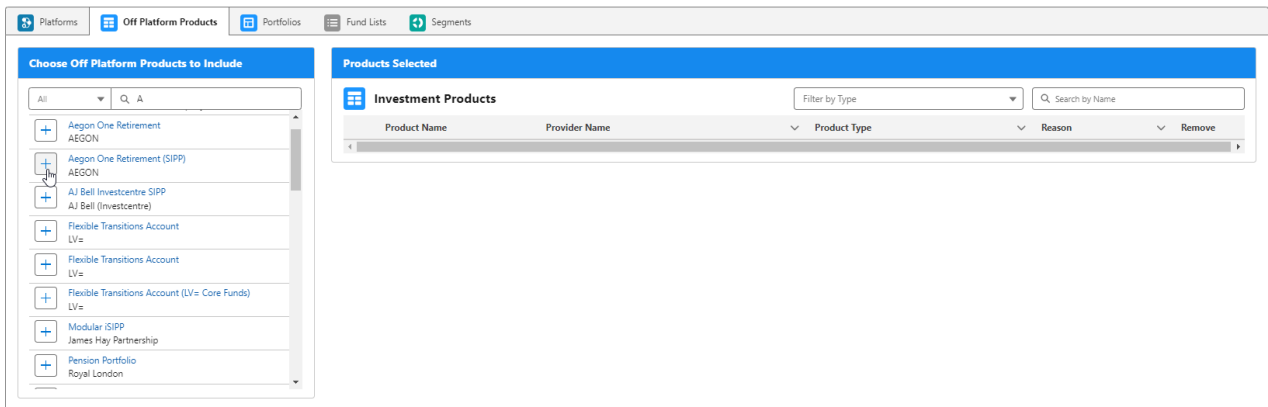
Navigation: Platforms | Off Platform Products | Portfolios

**Choose Off Platform Products to Include**

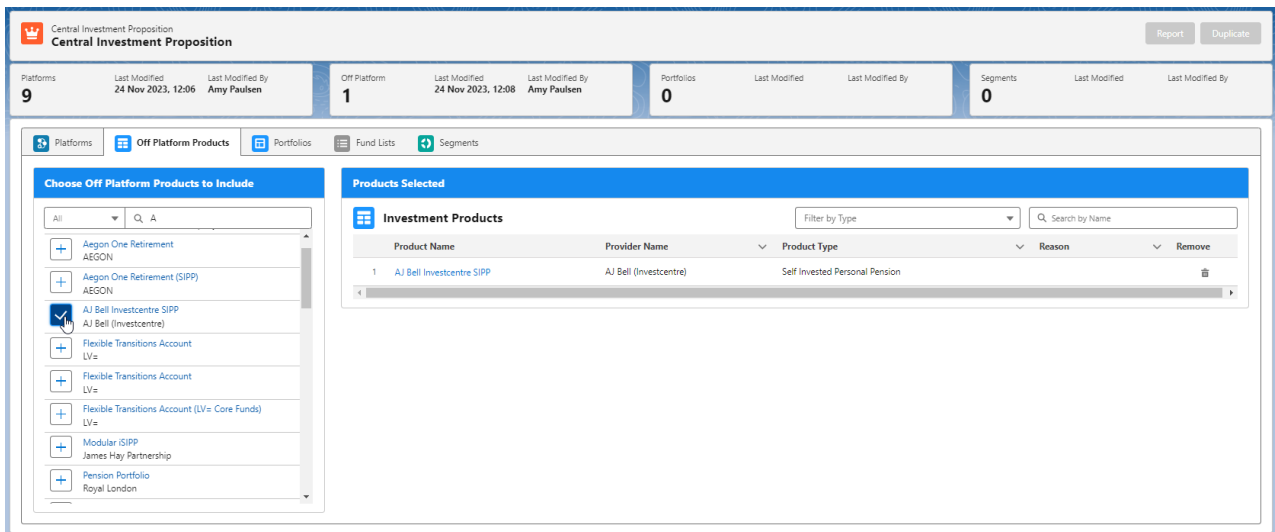
All ▼ | Search by Name

- All
- Personal Pension (Fully I...
- Investment Bond
- Offshore Bonds
- Individual Savings Acco...
- Self Invested Personal P...
- Income Drawdown

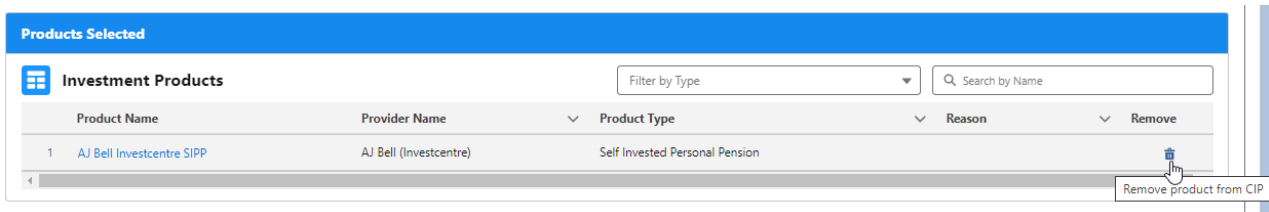
Once selected, use the Search box:



The Off Platform Product selected will display within the Products Selected area:



Products can be removed using the bin icon on the right side of the screen:



For more information on configuring your CIP, see article [Central Investment Proposition - Adding Portfolios](#)