

Central Investment Proposition - Creating Segments

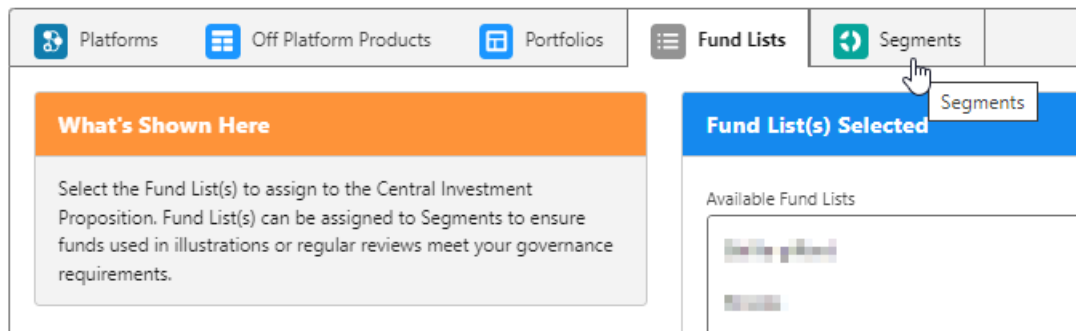
Last Modified on 24/11/2023 3:07 pm GMT

This article is a continuation of [Central Investment Proposition - Adding Fund Lists](#)

Creating segments within the Central Investment Proposition allows you to use the on & off platforms, portfolios and fund lists added to the CIP and allocate them to a segment. You are able to set Adviser Fees against each segment and set which users are assigned the segments.

Users that will be using the CIP & Segments, will need to be assigned, otherwise the research will be Whole of Market only.

In the article below, we will be allocating products, portfolios and a fund list to a segment and set the adviser fees. The user will then be assigned to ensure they are able to select the segment at the beginning of the research.



Add On/Off Platform Products, Portfolios, Fund Lists, Adviser Fees and Assign Users to the segment

Segment Details – Select, Edit or Delete

Select and move items over to allocate to the segment

Click the + next to **Add New Segment**

Complete details of the Segment

Portfolios Fund Lists Segments

Add Segment

* Segment Name: Segment 1 Test

* Target Investor Type: --None--

* Knowledge & Experience Type: --None--

Target Market Statement for PROD Compliance

Cancel Save

Save

Add Segment

* Segment Name: Segment 1 Test



* Target Investor Type: Retail

* Knowledge & Experience Type: Basic Investor

Target Market Statement for PROD Compliance

Target Market Statement Text

Cancel Save

 **Success!**
Segment successfully added to the CIP 

Central Investment Proposition
Central Investment Proposition. Report Duplicate

Platforms 8	Last Modified 12 May 2022, 12:02	Last Modified By Amy Paulsen	Off Platform 8	Last Modified 12 May 2022, 12:07	Last Modified By Amy Paulsen	Portfolios 1	Last Modified 12 May 2022, 12:09	Last Modified By Amy Paulsen	Segments 1	Last Modified 12 May 2022, 12:33	Last Modified By Amy Paulsen
----------------	-------------------------------------	---------------------------------	-------------------	-------------------------------------	---------------------------------	-----------------	-------------------------------------	---------------------------------	---------------	-------------------------------------	---------------------------------

Platforms Off Platform Products Portfolios Fund Lists Segments

Add New Segment

Segment 1 Test.

Investor Type: Retail

Knowledge & Experience: Basic Investor

Edit

Segment Details - Segment 1 Test.

Platforms Off Platform Products Portfolios Fund Lists Adviser Fees Assign Users

What's shown here

Select which Platforms should be included in the Segment. Including Platforms will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-post reviews.

Add / Remove Platforms in CIP from Segment

Platforms Available in CIP	Platforms in Segment
<ul style="list-style-type: none"> Aegon Platform AEGON Retirement Choices AJ Bell Investcentre Aviva Wrap Elevate Embark Platform 	

This article is a continuation of [Central Investment Proposition - Adding On Platforms to a Segment](#)