Central Investment Proposition -Adding Adviser Fees to a Segment

Last Modified on 12/05/2022 12:42 pm BST

This article is a continuation of Central Investment Proposition - Adding Fund Lists to a Segment

Add Adviser Fees to a segment within a Central Investment Proposition through the **Adviser Fees** tab:

Segment Details - Segment 1 Te	est		
Platforms Off Platform	n Products 🔲 Portfolios	E Fund Lists	Assign Users
What's shown here			ser Fees CIP from the Segment
Central Investment Proposition TestCIP			Report Duplicat
stforms Last Modified Last Modified By 08 Nov 2021, 17:14 User User	Off Platform Last Modified Last Modified By 5 User User User	Portfolios Last Modified Last Modified By 5 09 Nov 2021, 11:33 User User	Segments Last Modified Last Modified By 09 Nov 2021, 12:13 User User
🚯 Platforms 📰 Off Platform Products 🛅 Portfolios 🔳	Fund Lists Segments		
Add New Segment +	Segment Details - Segment 1 Test		
Segment 1 Test	Platforms Gff Platform Products Portfolios	🗉 Fund Lists 🔹 Adviser Fees 💄 Assign Users	
Investor Type Retail	What's shown here	Adviser Fees for Segment	
Knowledge & Experience Basic Investor Target Market Statement Target Market Statement Text	Apply the adviser fee values that are applicable to this segment. Select 'Disable Fees' Action if you want to enter the fees manually in the comparison or illustration journeys.	Initial Fee Regular Annual Fee	One off Fee for Advice
Edit			Ache

Fees can be entered using either a percentage or monetary amount:



Complete the details:

gment Detail	s - Segment 1 Test					
Platforms	Gff Platform Products	Portfolios	E Fund Lists	Adviser Fees	Assign Users	
What's show	vn here		Adviser Fe	es for Segment		
Apply the adviser fee values that are applicable to this segment. Select 'Disable Fees' Action if you want to enter the fees manually in the comparison or illustration journeys.		Initial Fee % £	1.00%	Regular Annual Fee % £ 0.80%	One off Fee for Advice	
						Enable Fees

Fees will be enabled by default.



For more information on configuring your CIP, see article Central Investment Proposition - Assigning Users to a Segment