In-House Discretionary - Compliance Tab

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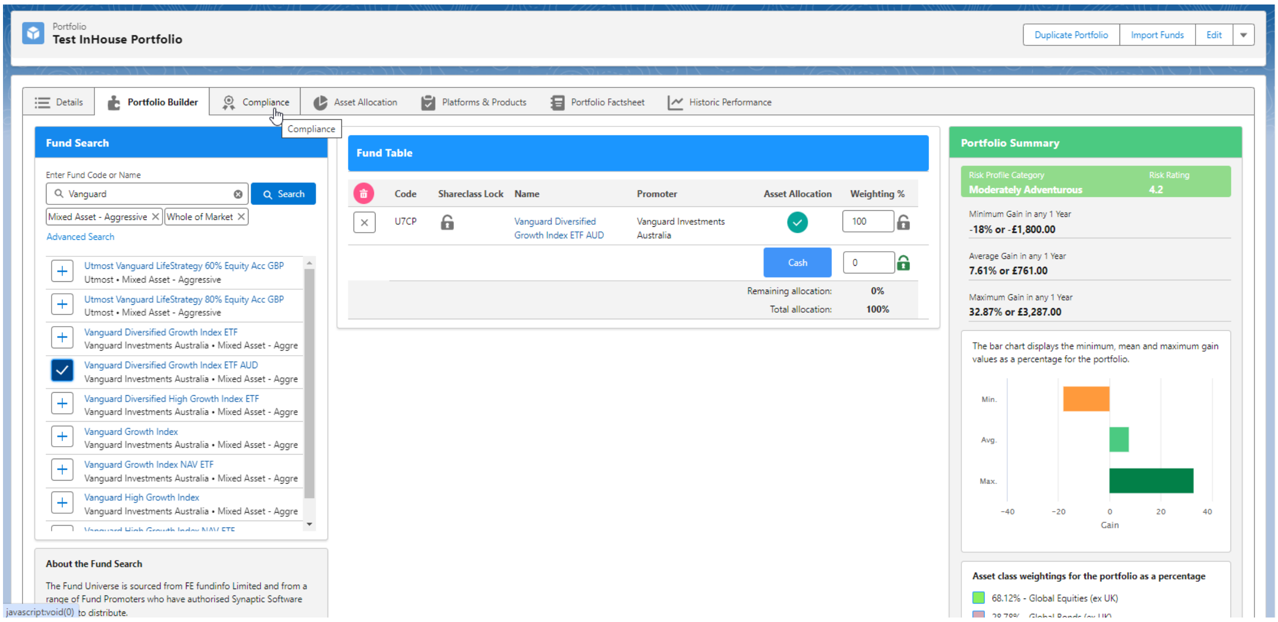
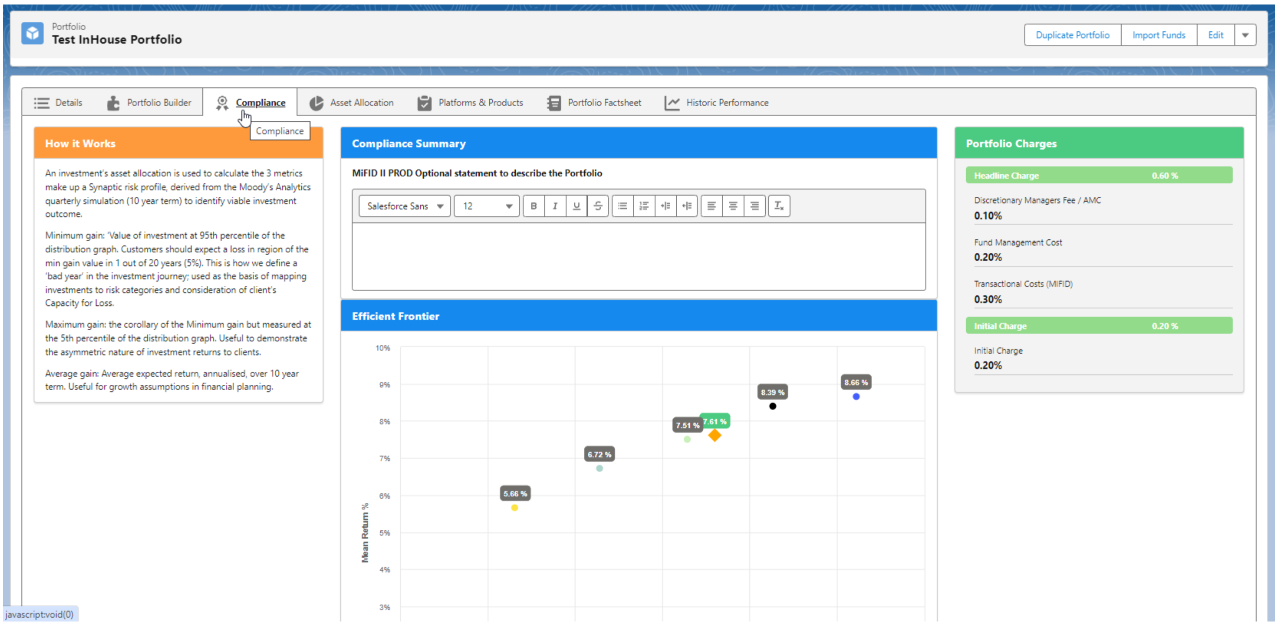
This article is a continuation of In-House Discretionary - Funds

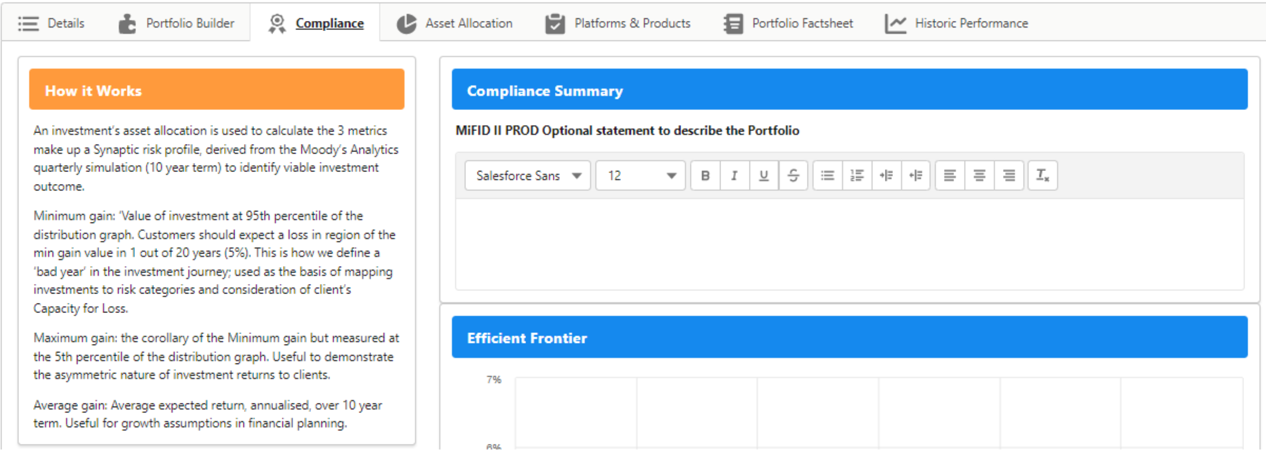
The compliance tab can be found within In-house discretionary portfolios.

Compliance can be found in the tabs at the top of the portfolio, as seen below:

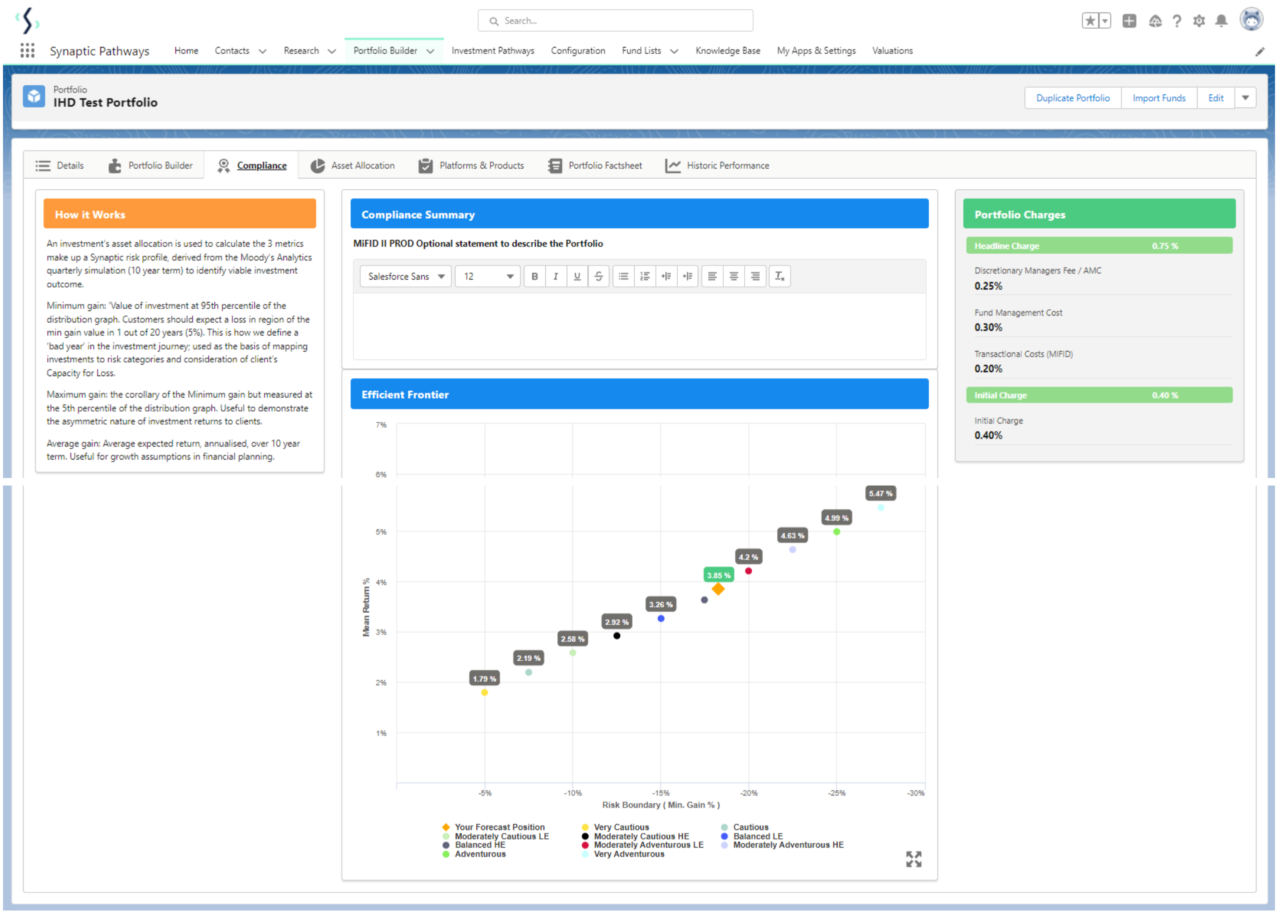




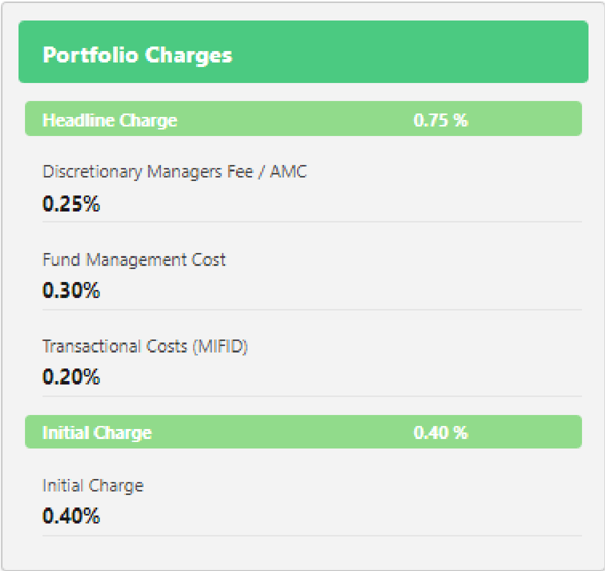
This area allows you to add a compliance summary for the portfolio (This is an optional)



An efficient frontier graph displays where the portfolio sits against the risk categories:



Charges can be found on the right side of the screen:



If any changes need to be made to the Charges, edit them in the Details tab.

For further information on In-House Discretionary Portfolio, see article In-House Discretionary - Asset Allocation