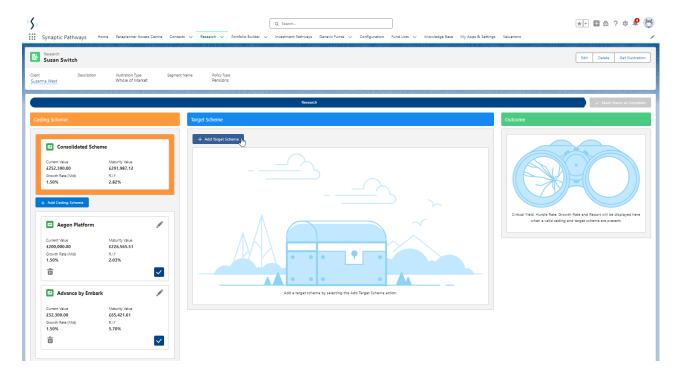
## **Switching - Add Target Scheme**

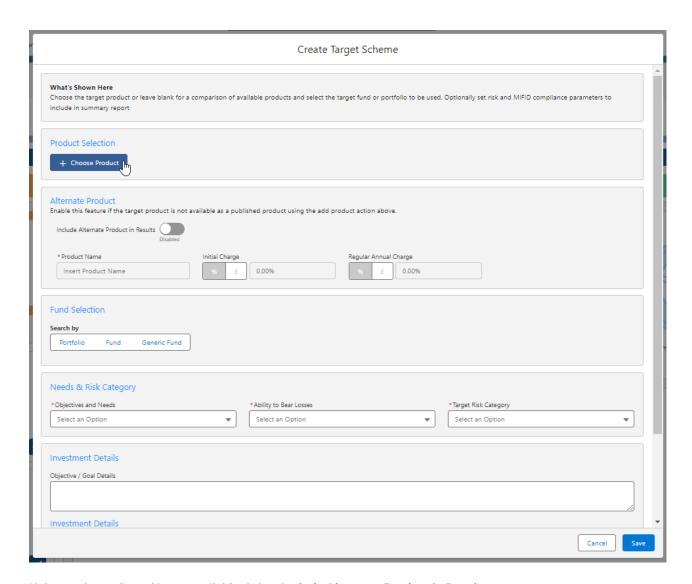
13/10/2025 3:08 pm BST

This article is a continuation of Switching - Add Ceding Scheme

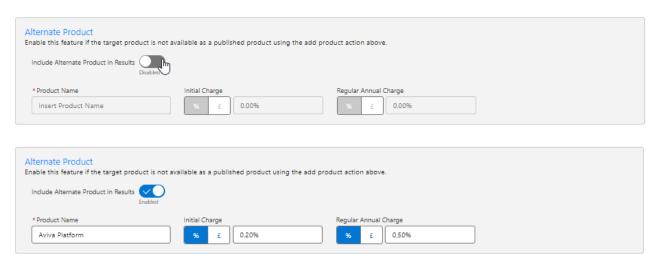
Add a Target Scheme through the + Add Target Scheme button:



Choose a target product or leave blank for a comparison of available products. In this example we will leave the product blank.



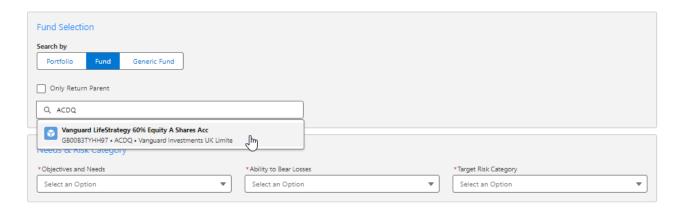
If the product selected is not available, Select Include Alternate Product in Results:



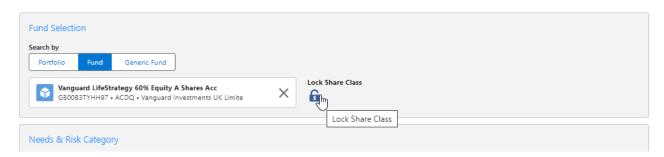
Select either a **Portfolio**, **Fund** or **Generic Fund**:



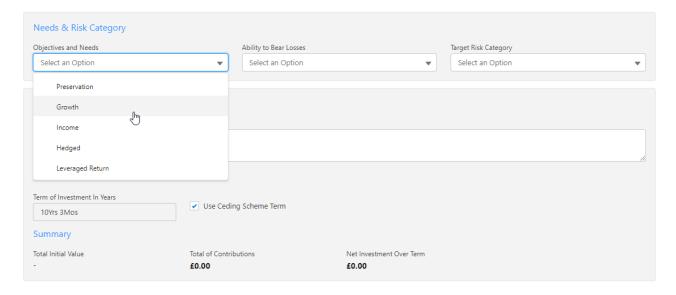
In this example, we will select a fund. Tick **Only Return Parent** if you would like the fund search to only return Parent funds.

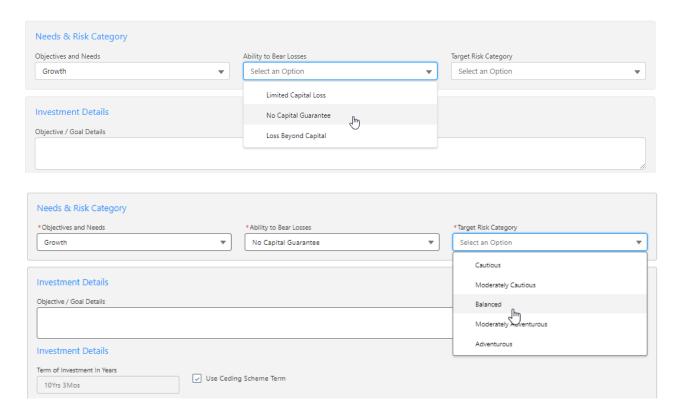


Tick the **Lock Share Class** button if you would like the exact fund selected to be used in the research. If left unselected, the system will find the cheapest share class available:



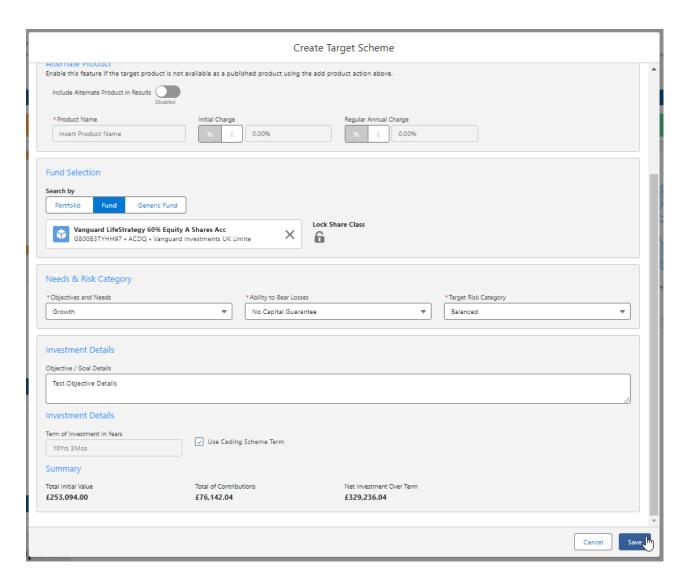
Complete the Needs & Risk Category area:



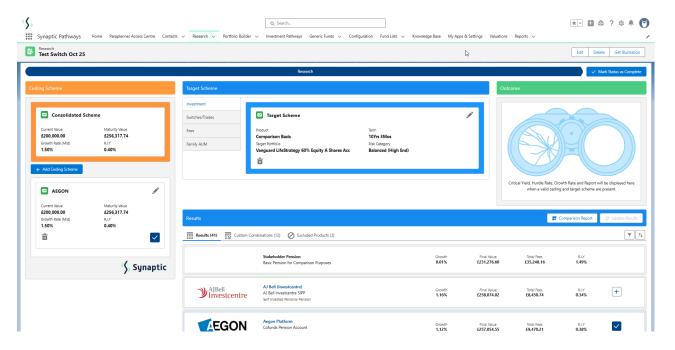


Summary details are calculated using the Transfer Value in the ceding scheme/s details.

Once complete, Save



This will populate the Target Scheme summary information at the top of the screen and will return a list of available products.



For further information on Switch research, see article Switching - Results Screen

