Filtering the grid of contracts

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The left-hand side of the grid screen shows all the fields of data which are recorded about the contracts, divided up into tabbed groups. (The fields and tabs which are available depend on the type of contract.)

Filtering (using preset criteria)	🖗 Rankin	g 🖲 Report 🖲 Quote Comparison	Change title Save as PDF Delete Copy Send	Shared He
eatures Sectors Conditions Stats	99 📃	20 contract	ts out of 25 (80%) - 0 manually excluded	Options
 Flexible access drawdown facility Option to take full UFPLS 	^	Сотрану	Contract	
Option to take partial UFPLS		AEGON	One Retirement	
	- 11	Aviva Life & Pensions UK Limited	Personal Pension	
Payment frequency options		AXA Life Invest (AXA Life Europe)	Secure Advantage+ Pension Plan	
Payment methods		AXA Wealth	Retirement Wealth Account (Adviser Charging)	
Pension premium insurance		Canada Life	CanRetire Pension Investment Plan	
	- 11	Cofunds Ltd	Cofunds Pension Account (provided by Suffolk Life)	
Guarantee options		FundsNetwork	FundsNetwork Personal Pension	
Accept minors		Legal & General	Portfolio Plus Pension	
Switching option	- 11	MetLife Services Ltd	The NetLife Retirement Portfolio (Secure Capital O	
Switching option	- 1	MetLife Services Ltd	The NetLife Retirement Portfolio (Secure Income C	
Automatic rebalancing		Old Mutual Wealth	Collective Retirement Account	
Lifestyle strategy		Old Mutual Wealth	CRA Wealth Select	
	- 11	Old Mutual Wealth	Personal Pension - Single Price	
Model portfolios		Prudential Intermediary Division	Pru Flexible Retirement Plan	
Death benefits	~	Reyal London	Pension Portfolio	
Teleperated Me enver	Ť	Sanlam	Portal Personal Pension	-
Clear all fibers Audit trail		Scottish Widows	The Retirement Account - Initial Adviser Charging	
Import filter		Standard Life Assurance Ltd	active money personal pension	

Features tab

The first, **Features** tab lists all the features offered by any of the contracts. Ticking the box next to a feature simply removes contracts which do not offer that feature. Ticking a second feature removes all the contracts which don't offer both features.

At the top of the grid, the caption tells you how many contracts meet all the conditions you're filtering on, and there's also a horizontal bar representing the percentage remaining.

Filtering (using preset criter	ria)			🛛 🕸 Ranking 🗍 🕏 Report	Comparison Change title Save as PDF Delete C	opy Send Not shared He
Features Sectors Conditions	Stats	PP 4		8 contract	is out of 95 (8%) - 0 manually excluded	Options
fin age cash	>= 🗸		~			
fin age on Stocks and Shares	>= ¥			Company	Contract	
faximum age at entry (nb)	3= 🗸			AXA Elevate	Elevate Stocks & Shares ISA - Explicit	
tinimum monthly contribution (£)	>= 🗸	50		Novia	Novia Stocks & Shares ISA	
finimum single contribution (£)	2= ¥			Nucleus	Nucleus ISA account	
finimum single contribution per und/brust (£)	>= 🗸			Seven Investment Management	ISA (Stocks and Shares)	
tinimum monthly withdrawal (£)	2= ¥			Standard Life Assurance Ltd	Standard Life FundZone ISA	
tinimum annual withdrawal (E)	2= ¥			Standard Life Assurance Ltd Zurich Intermediary Platform	Wrap ISA Zurich Intermediary Platform - Cash ISA Account	
finimum remaining balance (#))= ¥	-		Zurich Intermediary Platform	Zurich Intermediary Platform - Cash ISA Account Zurich Intermediary Platform Stocks and Shares II	
	>= 🗸	-				
bjective of ISA						
eposit (cash facility) interest rate %) paid to investor						
lasis of interest rate revision						
requency of interest rate revision	>= ¥					
ealing charge	-					

N.B. You can also filter on data items by adding the item to the grid and then clicking on any of the values in the new column. This will generate a short list of filtering options, such as 'greater or equal to' or 'Less or equal to' etc.

Sectors tab

The **Sectors** tab shows all the sectors in which any of the contracts offers a linked fund – e.g. UK Equity, UK Fixed Income, money market, real estate . You simply tick all the sectors in which you want to invest the client's money, and the system removes contracts unless they offer a fund link in all the sectors you've asked for.

The **Sectors** tab also allows you to search for specific funds – i.e. to identify only those contracts through which a fund or basket of funds can be bought.

NOTE – the **Sectors** tab requires a sector definition choice to be made (between FE Global and IMA/ABI/AIC) before sectors can be chosen.

Conditions tab

The **Conditions** tab shows policy conditions such as minimum age at entry, minimum investment, exit charges etc. You can filter on all numeric fields – for example, remove any contracts where the minimum age would prevent your client being able to take out the contract.

Stats tab

The **Stats** tab contains financial strength fields, plus other information such as the number of linked funds, projected surrender values etc. These fields can be filtered in the same way as policy conditions. For example, the second screenshot shows how to eliminate all contracts whose AKG financial strength rating is worse than 4.

Mody's rating in the statistics Company Contract Animum initial additional animum initial additional point animum initial additional point Fund link statistics AXA Wealth Investment Bond (Adviser Charping) £15,000 £10,000 Linked setters Investment Bond (Marpin) £5,000 £1,000 £ Standard Life Assurant Ombore Bond (Wrap) £5,000 £1,000 £	ering		S Ranking S Report	SQuote Comparison Change tit	e Save as PDF I	Delete Copy Ser	d Not shared
Moody's rating 3 >> >> additional entropy and an online statistics investment Bond (Adviser Chargong) £15,000 £1,000 Linked funds >> >> AXA Wealth Investment Bond (Adviser Chargong) £15,000 £1,000 Surrender Values Cannipus Ended Surface £1,000 £1,000 £1,000 Standard Life Assurant Charlow Bond (Yangong) £15,000 £1,000 £1,000 £1,000 Standard Life Assurant Charlow Bond (Yangong) £15,000 £2,500 £1,000 £1,000 Standard Life Assurant Charlow Bond (Yangong) £15,000 £2,500 £1,000 £1,000 Standard Life Assurant Charlow Bond (Yangong) £15,000 £2,500 £1,000 £1,000 Standard Life Assurant Charlow Bond (Yangong) £15,000 £1,000 £1,000 Standard Life Assurant Charlow Bond (Yangong) £15,000 £1,000 £1,000 Standard Life Assurant Charlow Bond (Yangong) £15,000 £1,000 £1,000	ures Sectors Conditions	Stats PP 🔳		5 contracts out of 20 (25%) - 0 m	anually excluded		Optic
Linked funds De V Cantovers Select Account (Adviser Charging) (215,000 (21,000) (21,	ty's rating 🟮		Company	Contract	Minimum initial investment (£)		Hinimum amount per policy (£)
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E10k Contribution after 1 year >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>		>= \	Standard Life Assurant	Onshore Bond (Wrap)	\$5,000	£3,000	40
ELOK Contribution after 3 years (Ser V)			Standard Life Assurance	Tailored Investment Bond	£15,000	\$2,500	£150
C10k Contribution after 5 years 💷 💌	Contribution after 1 year	>= ¥	Sterling Assurance	Sterling Investment Bond	\$5,000	\$3,000	40

<u>PP tab</u>

The **PP** tab contains past performance data for all the sectors in which any contract has a fund link – you click on the name of each sector to view the fields inside it.

The third screenshot shows how to filter out any contracts which don't have a UK Equity fund with positive alpha (i.e. a better risk/reward profile than the sector average).

iltering (using pre	set criteria)	10	Ranking # Report Co	mparison Change title Save as PDF Delete Copy	Send Not shared H
eatures Sectors Co	inditions Stats PP		14 contra	cts out of 95 (15%) · 0 manually excluded	Option
Equity - Tech Media & inds)	Telecom (Offshore	^ Compa	my	Contract	Offshore Funds: B:Eouity -
Equity - UK (Offshore I	Funds)				UK - Alpha
month	>- 🗸	Alliance	Trust Savings Limited	Individual Savings Account (Inclusive Fee Option)	0.71
month	>= 🗸	Alliance	Trust Savings Limited	Individual Savings Account (Standard Fee Option)	0.71
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vear	2. V	Standar	d Life Assurance Ltd	Wrap ISA	0.52
vear	2= ¥	Transac	t	Transact Wrap ISA	1.08
		Zurich 1	Intermediary Platform	Zurich Intermediary Platform - Cash ISA Account	1.08
0 year	>= 🗸	Zurich 1	Intermediary Platform	Zurich Intermediary Platform Stocks and Shares If	1.08

NOTE – the **PP** tab requires a sector definition choice to be made (between FE Global and IMA/ABI/AIC) before filtering can be done on past performance data (unless the choice has already been made on the Sectors tab).