Entering client details

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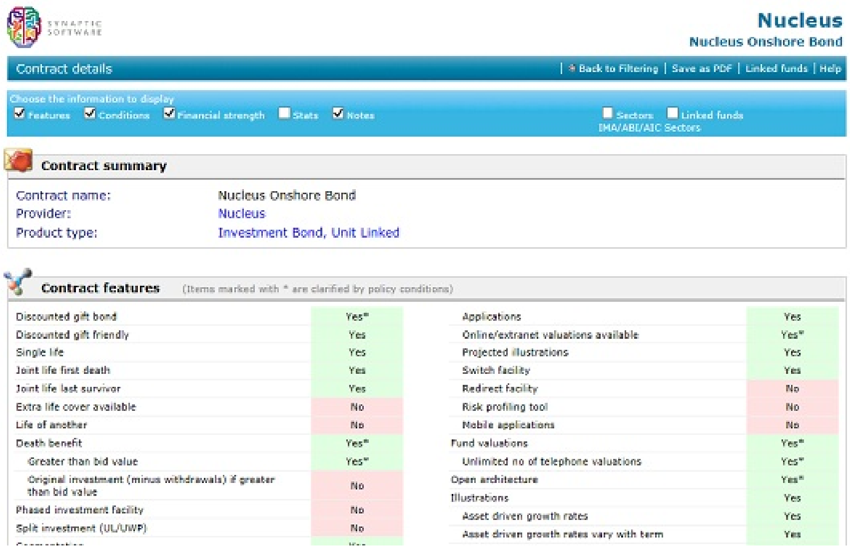
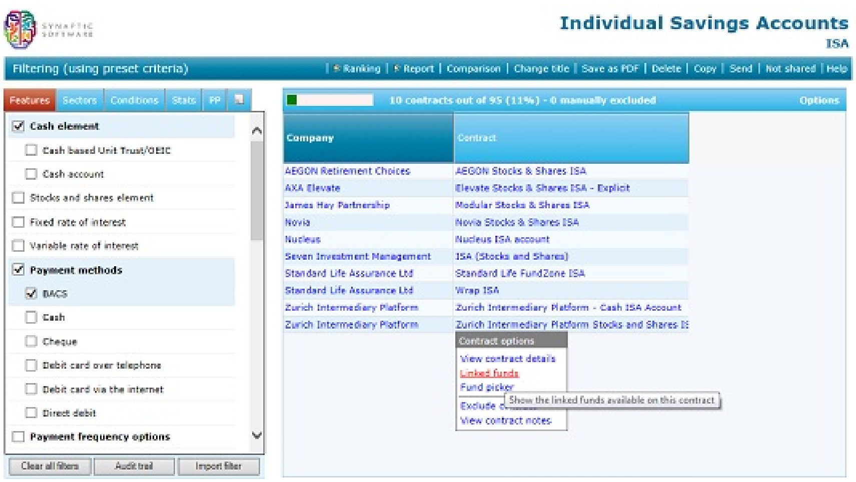
You can view a factsheet for an individual contract simply by clicking on its name in the grid (clicking on the company name displays a factsheet for the provider). The contract factsheet is illustrated by the first screenshot, and can be saved in PDF format using the link on the menu bar below the page's title.



A contract factsheet consists of a number of sections such as features, policy conditions, financial strength etc. You can choose which are included using the tickboxes at the top of the page.

The factsheet also includes a list of all linked funds available on the contract. However, this information can also be obtained in a quicker and more concise form: click the right mouse button over the contract name in the grid. This displays the pop-up menu illustrated by the second screenshot.



You simply choose **Linked funds** from the pop-up menu, and the system displays a page listing all the funds available on the contract, and details about their past performance (including risk-adjusted measures such as alpha and beta.)

This list of linked funds is illustrated by the third screenshot and again, it can be saved in PDF form.


Zurich Intermediary Platform

Zurich Intermediary Platform Stocks and Shares ISA Account

Linked funds on this contract | Back to filtering | Fund picker | Save as PDF | Fund research | Contract | Help

Provider and contract type:

Contract name: Zurich Intermediary Platform Stocks and Shares ISA Account
Provider: Zurich Intermediary Platform
Product type: Individual Savings Accounts, ISA

Select funds Show factsheets | Graph | Select all | Invert selection | Clear all | Show all | **FE Global Sectors**

GL:Absolute Return	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	InitChg	AMC
Aberdeen UK Flexible Strategy B	2.62	6.33	6.84		1.14	0.55	48	3	0.00	0.75
Absolute Insight W	0.80	2.93	3.17		0.45	0.09	37	4	0.00	0.75
Artemis Pan-European Absolute Return I Hedged Acc GBP	9.32								1.00	0.75
Artemis US Absolute Return I Hedged Acc									1.00	0.75
Aviva Inv Multi Strategy Target Income 2									0.00	0.75
Aviva Inv Multi Strategy Target Return 2	6.13								0.00	0.75
BlackRock Absolute Return Bond D	-0.37	1.02			0.32		1	2	0.00	0.50
BlackRock Dynamic Return Strategy D									0.00	0.80
BlackRock UK Absolute Alpha D Acc	8.04	5.14	2.49		1.42	0.13	29	1	0.00	0.75
BlackRock UK Absolute Alpha S Acc								1	5.00	0.67
BlackRock UK Absolute Alpha S Inc								1	5.00	0.67
CF Canlife Strategic Return C Acc	-1.13								4.75	0.75

Provided that your firm has paid for this module, you can then tick boxes next to one or more funds, and generate factsheets about those funds.