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.

| | | Nucleus Onshore B | | | | |
|---|---|---|--|--|--|--|
| Contract details | | A Back to Filtering Save as P | 8 Back to Filtering Save as PDF Linked funds | | | |
| hoose the information to display Peatures 🗹 Conditions 🗹 Financial : | strength 🔲 Stats 🗹 Notes | Sectors Linked funds EMA/ABI/AIC Sectors | | | | |
| Contract summary | | | | | | |
| Contract name: N | Aucleus Onshore Bond | | | | | |
| Provider: N | Nucleus | | | | | |
| Product type: I | Investment Bond, Unit Linked | | | | | |
| Contract features (Items m | narked with * are clarified by policy con | nditions) | | | | |
| • | narked with * are clarified by policy con Yes* | vitions) Applications | Yes | | | |
| Discounted gift bond | | | Yes Yes* | | | |
| Discounted gift bond Discounted gift friendly | Yes* | Applications | | | | |
| Discounted gift bond Discounted gift friendly Single life | Yes" Yes | Applications Online/extranet valuations available | Yes* | | | |
| Discounted gift bond Discounted gift friendly Single life Joint life first death | Yes" Yes Yes | Applications Online/extranet valuations available Projected illustrations | Yes* Yes | | | |
| Discounted gift bond Discounted gift friendly Single Iffe Joint life first death Joint life last survivor | Yes" Yes Yes Yes | Applications Online/extranet valuations available Projected illustrations Switch facility | Yes" Yes Yes | | | |
| Discounted gift bond Discounted gift friendly Single I/e Joint life first death Doint life list survivor Extra life cover available | Yes" Yes Yes Yes Yes | Applications Online/extranet valuations available Projected illustrations Switch facility Redirect facility | Yes* Yes Yes No | | | |
| Discounted gift bond Discounted gift friendly single life tiont life first death toint life last survivor Extra life cover available Jife of another Death benefit | Yes Yes Yes No | Applications Online/extranet valuations available Projected illustrations Switch facility Redirect facility Risk profiling tool Noble applications Fund valuations | Yes* Yes Yes No | | | |
| Discounted gift bond Discounted gift friendly Single I/e Leint life first death forint life last survivor Extra life cover available Dife of another Death benefit Greater than bid value | Yes" Yes Yes Yes No No Yes" Yes" | Applications Online/extranet valuations available Projected illustrations Switch facility Redreet facility Risk profiling tool Nobile applications Fund valuations Unlimited no of telephone valuations | Yes* Yes Yes No No | | | |
| Discounted gift bond Discounted gift friendly Single I/e Ioint life first death Ioint life last survivor Extra I/fe cover available Dist of another Death benefit Greater than bid value Original (investment) (minus withdrawala) | Yes" Yes Yes Yes No No Yes" Yes" | Applications Online/extranet valuations available Projected illustrations Switch facility Redirect facility Risk profiling tool Noble applications Fund valuations Unifinited no of telephone valuations Open architecture | Yes* Yes Yes No No Yes* | | | |
| Discounted gift bond Discounted gift friendly Single life Joint life first death Dath life first death Extra life cover available Life of another Death benchit Greater than bid value Original investment (minua withdrawals) | Yes" Yes Yes Yes No No Yes" Yes" Yes" No | Applications Online/extranet valuations available Projected illustrations Switch Facility Redirect facility Risk profiling tool Noble applications Fund valuations Unlimited no of telephone valuations Open architecture Illustrations | Yes" Yes Yes No No Yes" Yes" Yes | | | |
| Discounted gift bond Discounted gift friendly Single I/e Joint life first death Joint life first death Extra life cover available Life of another Death benefit Greater than bid value Original investment (minus withdrawala) | Yes" Yes Yes Yes Yes No No Yes" Yes" | Applications Online/extranet valuations available Projected illustrations Switch facility Redirect facility Risk profiling tool Noble applications Fund valuations Unifinited no of telephone valuations Open architecture | Yes" Yes Yes No No Yes" Yes" Yes" | | | |

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.

| Filtering (using preset criteria) | | & Ranking & Report Comparison Change title Save as PDF Delete Copy Send Not shared He | | | | | | | |
|--------------------------------------|-----|---|--|--|--|--|--|--|--|
| Features Sectors Conditions Stats PP | | 10 contracts out of 95 (11%) - 0 manually excluded | | | | | | | |
| ✓ Cash element | ~ | Company | Centract | | | | | | |
| Cash based Unit Trust/OEIC | 1 | company | Commes | | | | | | |
| Cash account | | AEGON Retirement Choices | AEGON Stocks & Shares ISA | | | | | | |
| | - 1 | AXA Elevate | Elevate Stocks & Shares ISA - Explicit | | | | | | |
| Stocks and shares element | | James Hay Partnership | Modular Stocks & Shares ISA | | | | | | |
| Fixed rate of interest | | Novia | Novia Stocks & Shares ISA | | | | | | |
| Variable rate of interest | | Nucleus | Nucleus ISA account | | | | | | |
| | | Seven Investment Nanagement | ISA (Stocks and Shares) | | | | | | |
| Payment methods | | Standard Life Assurance Ltd | Standard Life FundZone ISA | | | | | | |
| Ø BACS | | Standard Life Assurance Ltd | Wrap ISA | | | | | | |
| Cash | | Zurich Intermediary Platform | Zurich Intermediary Platform - Cash ISA Account | | | | | | |
| | - 1 | Zurich Intermediary Platform | Zurich Intermediary Platform Stocks and Shares IS | | | | | | |
| Cheque | - 1 | | Contract options | | | | | | |
| Debit card over telephone | | | Linked funds | | | | | | |
| Debit card via the internet | | | Fund picker | | | | | | |
| Direct debit | - 1 | | Exclude Show the linked funds available on this contract | | | | | | |
| L Lifect debit | | | View contract notes | | | | | | |

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 riskadjusted 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.

| SOPTWARE | Zurich Intermediary Platform Zurich Intermediary Platform Stocks and Shares ISA Account | | | | | | | | | | | | |
|--|--|--|------------|------------------|-----------|-----------------|-------------|-------------|-----------|---------------|------------|------|--|
| Linked funds on t | this contract | | | 181 | lack t | o filtering F | Fund picker | Save as PDF | Fund rese | arch Contra | ict Help | | |
| Provider and con | ntract type: | | | | | | | | | | | | |
| Contract name: Provider: Product type: | Zurich Inter | mediary Plat mediary Plat avings Accou | | | | | | | | | | | |
| Select funds | Show factsheets | Graph | Select all | Invert selection | Clear all | | Show all | FE Global S | Sectors | | | | |
| GL:Absolute Re | turn | | lyr | Byr | Syr | 10yr | Vol. | Alpha | QScore | Crown | InitChg | AMC | |
| Aberdeen UK Flex | ible Strategy 5 | | 2.62 | 6.33 | 6.84 | | 1.14 | 0.55 | 45 | 3 | 0.00 | 0.75 | |
| Absolute Insight | w | | 0.80 | 2.93 | 3.17 | | 0,45 | 0.09 | 37 | 4 | 0.00 | 0.75 | |
| Hedged Acc GBP | pean Absolute Return | 1 | 9.32 | | | | | | | | 1.00 | 0.75 | |
| Artemis US Absol | ute Return I Hedged A | lec . | | | | | | | | | 1.00 | 0.75 | |
| Aviva Inv Multi S | trategy Target Income | 2 | | | | | | | | | 0.00 | 0.75 | |
| Aviva Inv Multi S | trategy Target Return | 2 | 6.13 | | | | | | | | 0.00 | 0.75 | |
| BlackRock Absolu | te Return Bond D | | -0.37 | 1.02 | | | 0.32 | | 1 | 2 | 0.00 | 0.50 | |
| BlackRock Dynam | nic Return Strategy D | | | | | | | | | | 0.00 | 0.80 | |
| BlackRock UK Ab | solute Alpha D Acc | | 8.04 | 5.14 | 2.49 | | 1.42 | 0.13 | 29 | 1 | 0.00 | 0.75 | |
| BlackRock UK Ab | solute Alpha S Acc | | | | | | | | | 1 | 5.00 | 0.67 | |
| BlackRock UK Ab | solute Alpha S Inc | | | | | | | | | 1 | 5.00 | 0.67 | |
| CF Canlife Strate | gic 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.