

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.

The screenshot shows the 'Contract details' page for 'Nucleus Onshore Bond'. At the top, there are navigation links: 'Back to Filtering', 'Save as PDF', 'Linked funds', and 'Help'. Below this is a section to 'Choose the information to display' with checkboxes for 'Features', 'Conditions', 'Financial strength', 'Stats', and 'Notes'. There are also checkboxes for 'Sectors' and 'Linked funds' with sub-options for 'IMA/ABU/AIC Sectors'. The 'Contract summary' section lists: Contract name: Nucleus Onshore Bond, Provider: Nucleus, and Product type: Investment Bond, Unit Linked. The 'Contract features' section is a table with columns for feature names, status (Yes/No), and clarifications. Features include 'Discounted gift bond', 'Discounted gift friendly', 'Single life', 'Joint life first death', 'Joint life last survivor', 'Extra life cover available', 'Life of another', 'Death benefit', 'Greater than bid value', 'Original investment (minus withdrawals) if greater than bid value', 'Phased investment facility', and 'Split investment (UL/UWP)'. Other features include 'Applications', 'Online/extranet valuations available', 'Projected illustrations', 'Switch facility', 'Redirect facility', 'Risk profiling tool', 'Mobile applications', 'Fund valuations', 'Unlimited no of telephone valuations', 'Open architecture', 'Illustrations', 'Asset driven growth rates', and 'Asset driven growth rates vary with term'.

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.

The screenshot shows the 'Individual Savings Accounts' page. At the top, there are navigation links: 'Ranking', 'Report', 'Comparison', 'Change title', 'Save as PDF', 'Delete', 'Copy', 'Send', 'Not shared', and 'Help'. Below this is a section for 'Filtering (using preset criteria)' with a status bar showing '10 contracts out of 95 (11%) - 0 manually excluded'. The main area is a table with columns for 'Company' and 'Contract'. The table lists various providers and their corresponding ISA products. A right-click context menu is open over the 'Zurich Intermediary Platform' entry, showing options: 'View contract details', 'Linked funds', 'Fund picker', 'Exclude', 'Show the linked funds available on this contract', and '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 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							
			1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	IntChg	AHC		
<input type="checkbox"/>														
<input type="checkbox"/>			2.62	6.33	6.84		1.14	0.35	48	3	0.00	0.75		
<input type="checkbox"/>			0.80	2.93	3.17		0.45	0.09	37	4	0.00	0.75		
<input type="checkbox"/>			9.32								1.00	0.75		
<input type="checkbox"/>											1.00	0.75		
<input type="checkbox"/>											0.00	0.75		
<input type="checkbox"/>			6.13								0.00	0.75		
<input type="checkbox"/>			-0.37	1.02			0.32		1	2	0.00	0.50		
<input type="checkbox"/>											0.00	0.80		
<input type="checkbox"/>			8.04	5.14	2.49		1.42	0.13	29	1	0.00	0.75		
<input type="checkbox"/>											1	5.00	0.67	
<input type="checkbox"/>											1	5.00	0.67	
<input type="checkbox"/>			-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.