

Can I create a panel of products?

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Synaptic's comprehensive market research can be used to establish panels and/or lists of approved products. Panels can be based on either of the following two things, or a combination of them:

- A manual selection of approved contracts.
- The system's automated selection of contracts which meet filtering criteria. For example, all the contracts which offer particular features, or whose charges are below a certain amount, or with a minimum level of financial strength, or which meet particular past performance criteria.

These panels can then be distributed instantly to all the other users in your firm, with immediate effect.

Part or all of the panel definition can be locked, preventing advisers from going off-panel. Alternatively, "trusted" advisers can still be allowed to select from the whole-of-market, but their suitability reports will tell the compliance officer exactly which ways they've deviated from the normal approved list of products.
