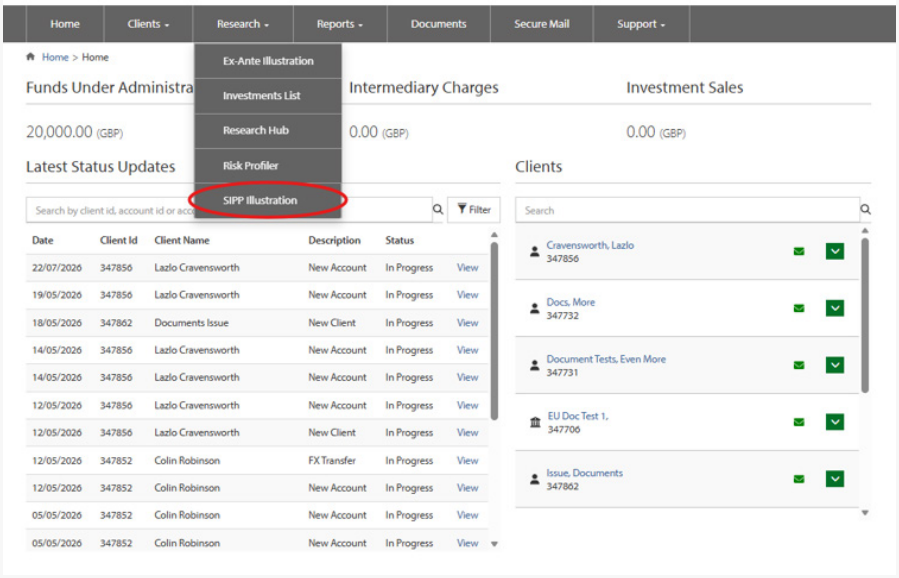
The smart investment platform

New SIPP Illustration

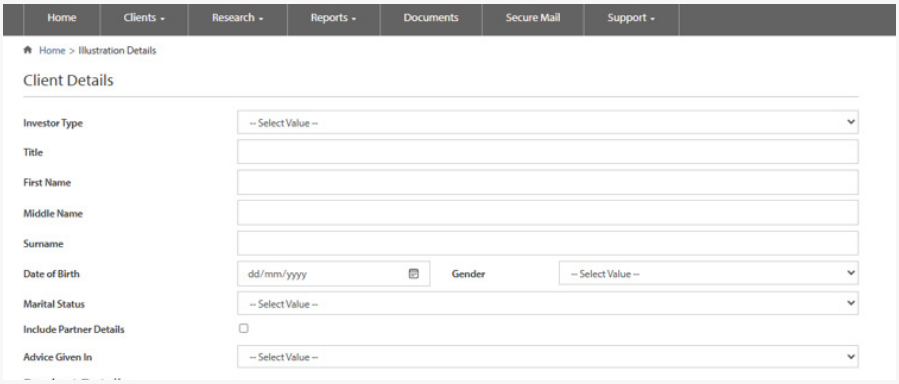
Adviser Guide

Process



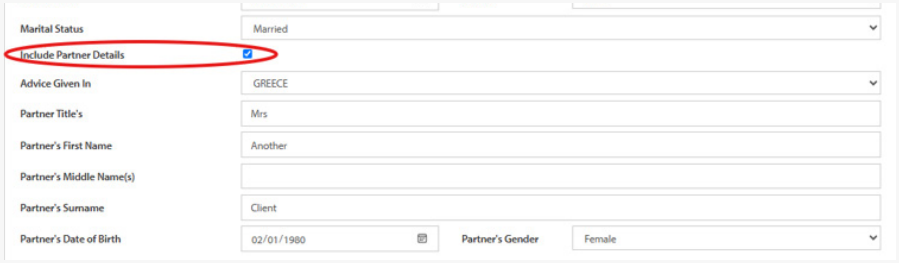
Step 1

From the Research tab in the nav bar, select SIPP Illustration.



Step 2

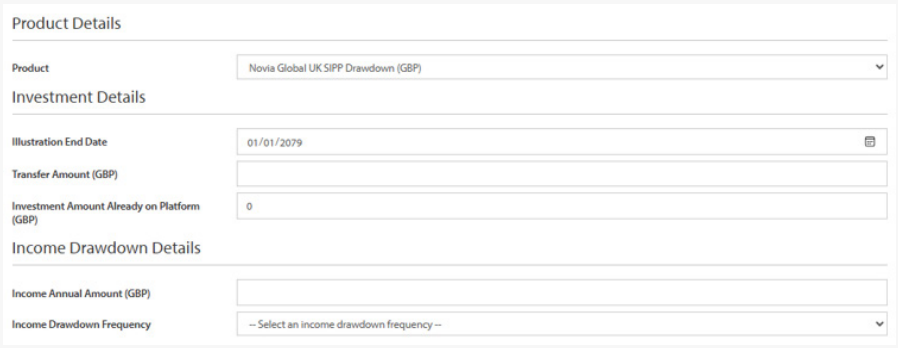
Please enter the details of the client on this screen.



Step 3

To add Partner Details, select Include Partner Details tick-box and the entry fields will dropdown.

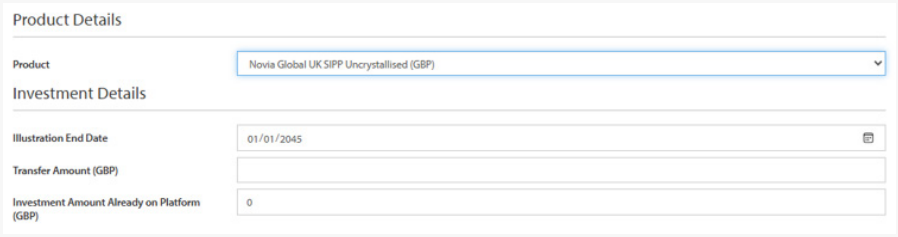
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Step 4

The entry fields are dynamic, changing based on the **Product** selected. Please make sure to fill out every section applicable to the requirements of your illustration.

These are the options available for **Drawdown**.



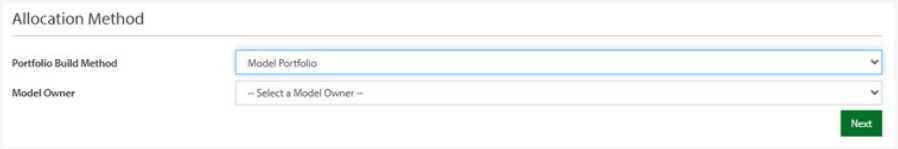
Step 5

The entry fields are dynamic, changing based on the **Portfolio Build Method** selected. Please make sure to fill out every section applicable to the requirements of your illustration.

These are the options available for **Asset Selector**.

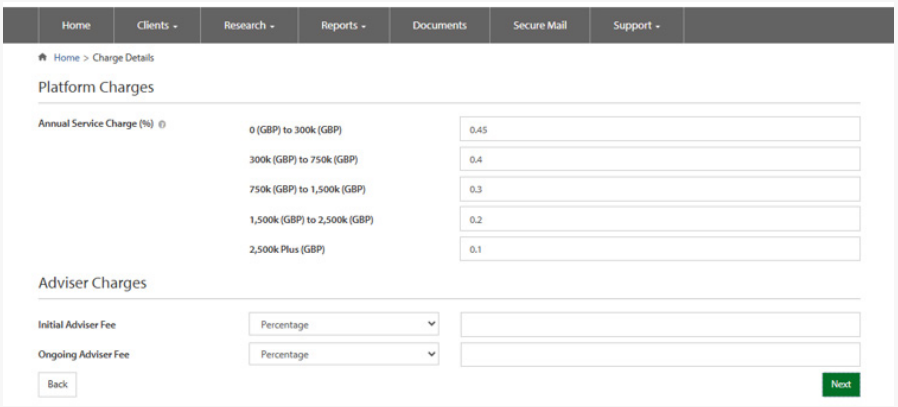


These are the options available for for **Model Portfolio**.

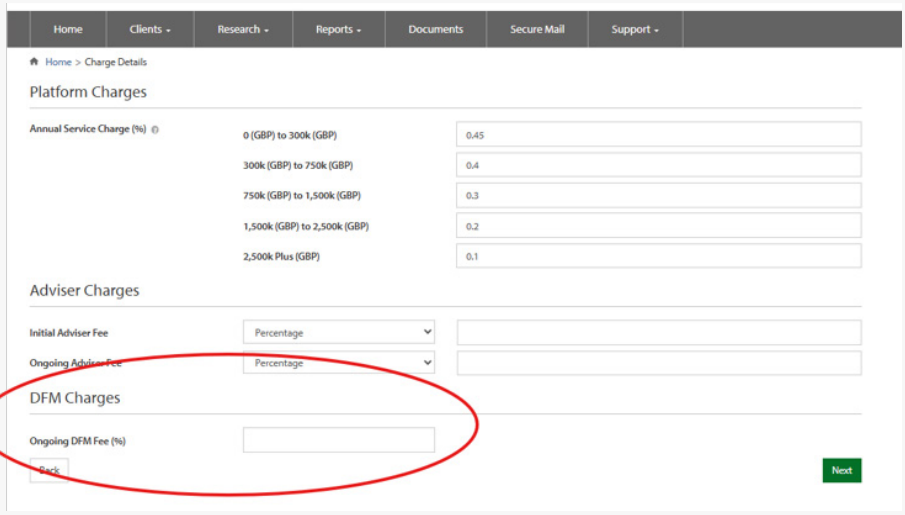


Step 6

Clicking Next will take you to the Charge Details page.

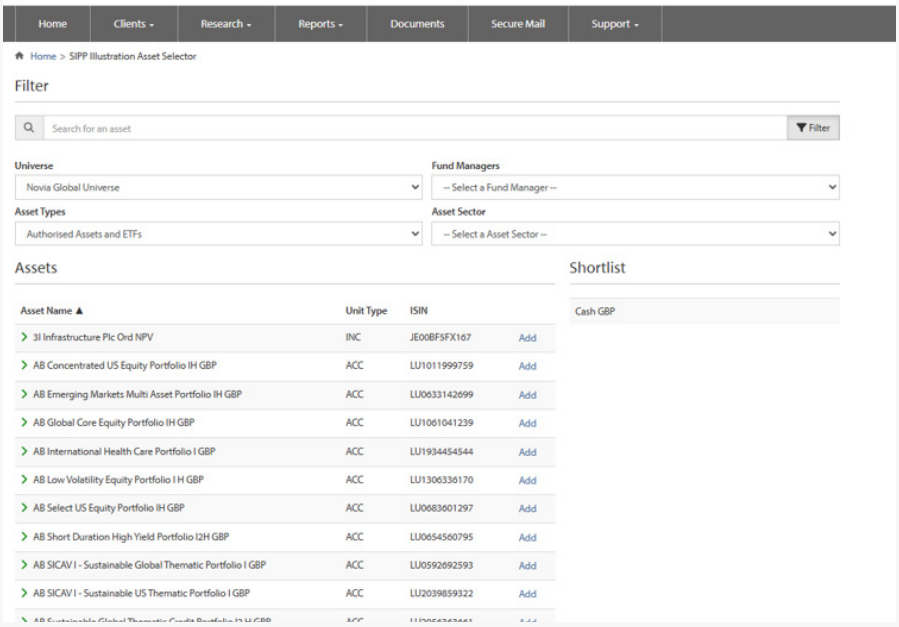


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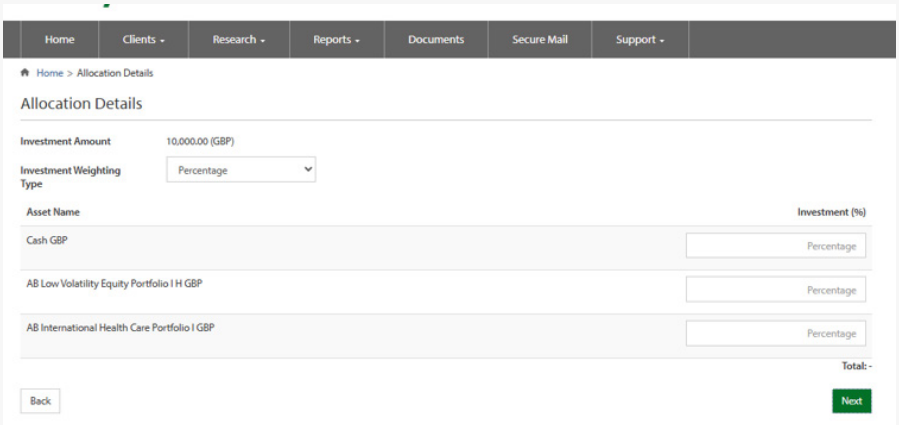
Step 7

Where you have selected the **Portfolio Build Method** to be **Model Portfolio** *and* the **Model Owner** to be **DFM**, an additional section, DFM Charges, will appear on the Charge Details page.



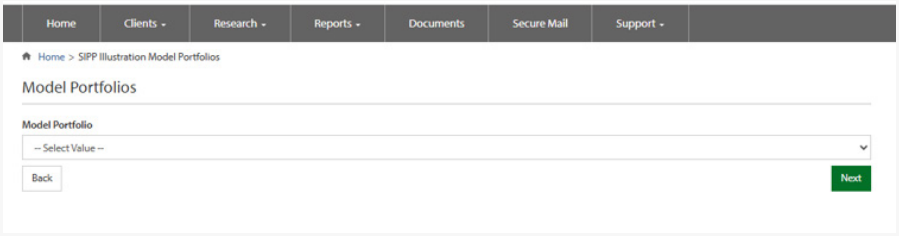
Step 8

Where you have selected the **Portfolio Build Method** to be **Asset Selector**, clicking Next on the Charge Details page will take you to the **SIPP Illustration Asset Selector** page.



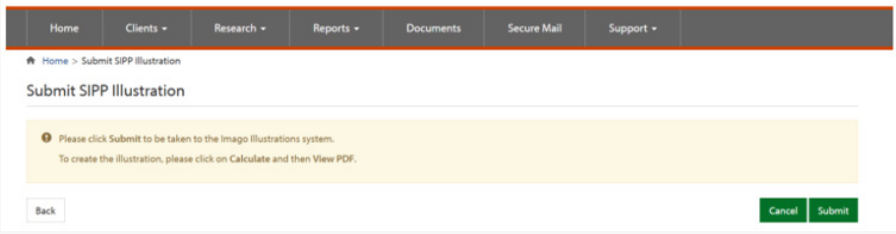
After selecting assets, clicking Next will take you to the Allocation Details page

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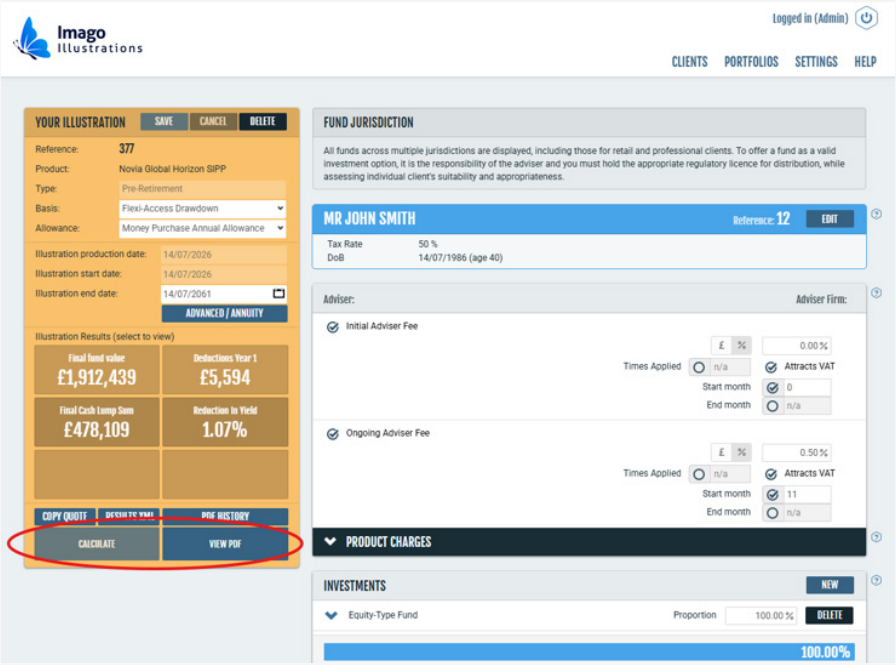
Step 9

Where you have selected the **Portfolio Build Method** to be **Model Portfolio,** clicking Next on the Charge Details page will take you to the **SIPP Illustration Model Portfolios** page.



Step 10

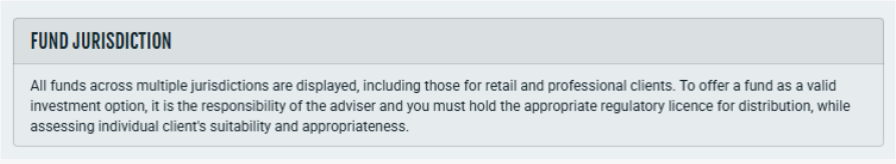
Clicking the Next button on either the **Allocation Details** page (where Portfolio Method is Asset Selector) OR the **SIPP Illustration Model Portfolios** page (where Portfolio Method is Model Portfolio) will take you to the **Submit SIPP Illustration page**.



Step 11

Clicking the Submit button will send the entered details via payload to the Imago Illustrations system and open up the Imago site.

The user will then need to click Calculate to create their illustrations and View PDF if they would like to save a copy.



Step 12

As users can edit fields within Imago, there is also a disclaimer on this page which warns that it is the adviser's responsibility to provide valid investment options.

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