SYNAPTIC PRODUCT & FUND

Synaptic Product & Fund
Quick Start Guide

STEP 1.

Login

SYNAPTIC

www.synaptic.co.uk

- Passwords must have at least 8 characters, including a capital letter and number.
- After 3 incorrect attempts your account will lock out for 15 minutes.
- If you require a password reset, please contact the Support team.

Quick find

Find: Contract | Company | Fund | Client

The 'Quick find' box can be used as a search engine; you can search by contract, company, fund or by client

Research Process

Whatever you are researching be it a Pension, Bond or Fund, all research follows the same process below:

Filtering

Essential - select criteria the client <u>must have</u> in their plan. Any plan that does not meet this criteria will be removed from the list.

Ranking

Desirable - of the remaining filtered plans, which features are more desirable to the client. Rank all plans based on your preferred criteria. You can also rank on other features depending on the product, for example financial strength.

Reporting

Suitability - reports can now be produced for evidence of research, confirmation of features and benefits selected and creation of suitability letter.
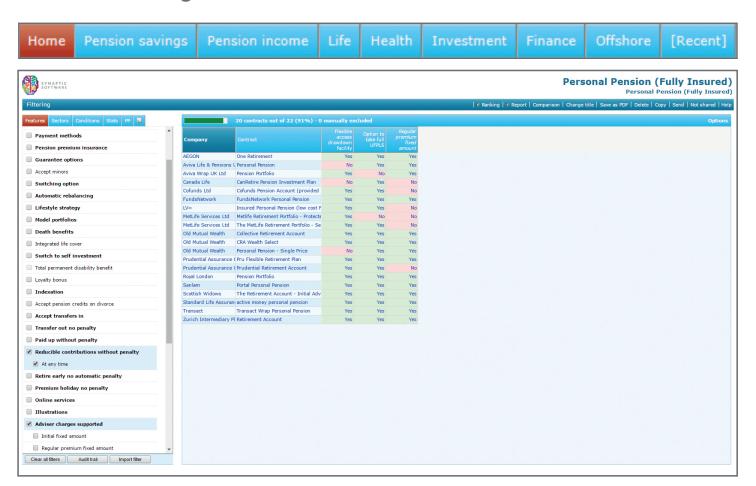
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PRODUCT

You can find a list of product types under each product tab. All products begin with a client entry screen. Once you start the research, there will be a list of available contracts that can be researched.
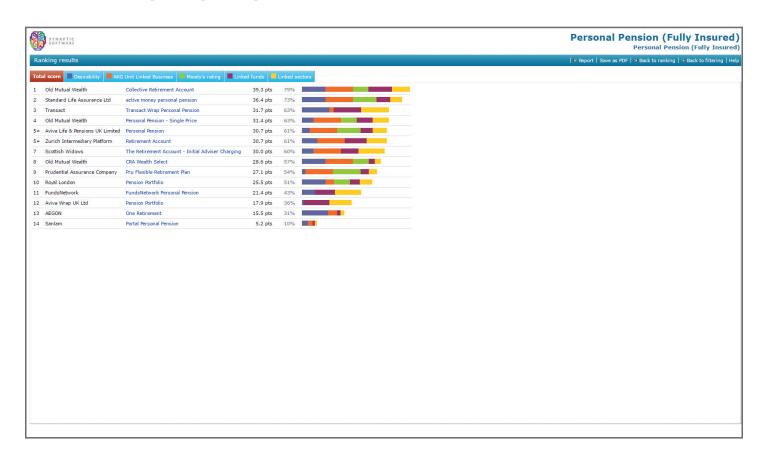
STEP 2.

Product P&F Filtering screen

STEP 3.

Product Ranking & Reporting

FUND

Fund research also begins with a client entry screen. The filtering screen will be blank to start with; you will need to select one or more sectors to add funds.
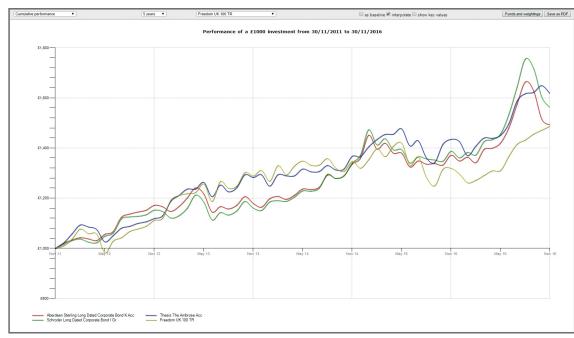
Fund data

Investment trusts

Unit trusts/OEICs

Life funds

Pension funds

Offshore funds

AIC sectors

IMA sectors

ABI life fund sectors

ABI pension fund sectors

Financial Express categories

Located under the Investment product tab you will find access to Fund data.

STEP 4.

Fund Filtering

TIP: Manual fund lists can be used as filter criteria in appropriate product types

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