



SYNAPTIC  
PRODUCT  
& FUND

# Synaptic Product & Fund

## Quick Start Guide

### STEP 1.



[www.synaptic.co.uk](http://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
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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 must have 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.

#### TECHNICAL SUPPORT

t: 0800 028 0033 e: [support@synaptic.co.uk](mailto:support@synaptic.co.uk)

#### SALES & CUSTOMER SERVICES

t: 0800 783 4477 e: [customerservices@synaptic.co.uk](mailto:customerservices@synaptic.co.uk)



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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

Home
Pension savings
Pension income
Life
Health
Investment
Finance
Offshore
[Recent]

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**Personal Pension (Fully Insured)**  
Personal Pension (Fully Insured)

Filtering
Ranking
Report
Comparison
Change title
Save as PDF
Delete
Copy
Send
Not shared
Help

Features
Sectors
Conditions
Stats
PP

☐ Payment methods  
☐ Pension premium insurance  
☐ Guarantee options  
☐ Accept minors  
☐ Switching option  
☐ Automatic rebalancing  
☐ Lifestyle strategy  
☐ Model portfolios  
☐ Death benefits  
☐ Integrated life cover  
☐ Switch to self investment  
☐ Total permanent disability benefit  
☐ Loyalty bonus  
☐ Indexation  
☐ Accept pension credits on divorce  
☐ Accept transfers in  
☐ Transfer out no penalty  
☐ Paid up without penalty  
☒ Reducible contributions without penalty  
☒ At any time  
☐ Retire early no automatic penalty  
☐ Premium holiday no penalty  
☐ Online services  
☐ Illustrations  
☒ Adviser charges supported  
☐ Initial fixed amount  
☐ Regular premium fixed amount

20 contracts out of 22 (91%) - 0 manually excluded
Options

Company	Contract	Flexible access drawdown facility	Option to take full UFPLS	Regular premium fixed amount
AEGON	One Retirement	Yes	Yes	Yes
Aviva Life & Pensions Ltd	Personal Pension	No	Yes	Yes
Aviva Wrap UK Ltd	Pension Portfolio	Yes	No	Yes
Canada Life	CanRetire Pension Investment Plan	No	Yes	No
Cofunds Ltd	Cofunds Pension Account (provided	Yes	Yes	No
FundsNetwork	FundsNetwork Personal Pension	Yes	Yes	Yes
LV=	Insured Personal Pension (low cost F	Yes	Yes	No
MetLife Services Ltd	MetLife Retirement Portfolio - Protect	Yes	No	No
MetLife Services Ltd	The MetLife Retirement Portfolio - Se	Yes	Yes	No
Old Mutual Wealth	Collective Retirement Account	Yes	Yes	Yes
Old Mutual Wealth	CRA Wealth Select	Yes	Yes	Yes
Old Mutual Wealth	Personal Pension - Single Price	No	Yes	Yes
Prudential Assurance ( Pru Flexible Retirement Plan		Yes	Yes	Yes
Prudential Assurance ( Prudential Retirement Account		Yes	Yes	No
Royal London	Pension Portfolio	Yes	Yes	Yes
Sanlam	Portal Personal Pension	Yes	Yes	Yes
Scottish Widows	The Retirement Account - Initial Adv	Yes	Yes	Yes
Standard Life Assurance	active money personal pension	Yes	Yes	Yes
Transact	Transact Wrap Personal Pension	Yes	Yes	Yes
Zurich Intermediary Pl	Retirement Account	Yes	Yes	Yes

Clear all filters
Audit trail
Import filter

## 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

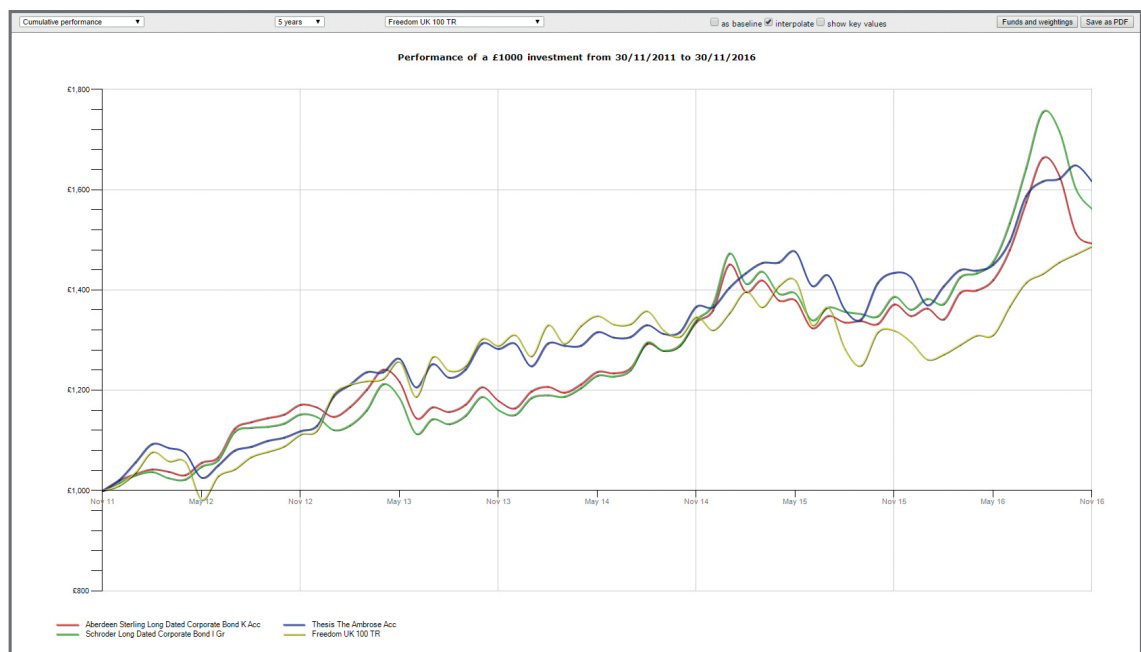
**Fund data**  
Unit trusts/OEICs

Filtering: [Banking] [Report] [Change title] [Availability] [Save as PDF] [Delete] [Copy] [Send] [Not shared] [Convert to manual] [Help]

Showing 1 to 19 of 19 funds

Fund	Annual perf.: AP 1 year	Annual perf.: AP 3 years	Annual perf.: AP 5 years	Cumul. perf.: CP 1 year	Cumul. perf.: CP 3 years	Cumul. perf.: CP 5 years	Risk metrics: Alpha
SBW Dunninger B Acc	18.99	11.16	12.1	18.99	37.35	77.02	0.16
SBW Ilex Growth Acc	20.73	11.49	12.09	20.73	38.59	76.96	0.17
SBW Forest Acc	19.82	11.45	12.1	19.82	38.44	77.03	0.19
Fidelity Asia W Acc	33.08	13.14	11.9	33.08	44.84	75.47	0.25
CF New Floco	15.06	12.31	14.04	15.06	41.66	92.85	0.3
Royal London Sustainable World Trust C Acc	12.14	11.41	14.83	12.14	38.3	99.64	0.34
Premier Multi-Asset Global Growth C Inc	18.35	11.35	14.29	18.35	38.06	95.01	0.35
FP CRUX European Special Situations I Acc GBP	19.7	10.81	15.99	19.69	36.06	109.92	0.37
Evenlode Income B Inc	14.33	10.63	14.54	14.33	35.41	97.18	0.56
First Arrow Diversified Acc	20.79	11.09	11.54	20.79	37.11	72.63	0.57
Liontrust UK Smaller Companies I Inc	10.95	13.79	20.19	10.95	47.33	150.78	0.59
AXA Framlington Japan Z Inc	30.75	18.15	17.91	30.75	64.91	127.94	0.64
First State Global Listed Infrastructure B GBP Acc	32.51	16.4	15.25	32.51	58.53	103.35	0.66
MFH Techinvest Special Situations	9.53	14.09	19.16	9.53	48.5	140.26	0.69
Man GLG Continental European Growth C Professic	18.18	17.06	20.79	18.18	60.42	157.18	0.94
Fundsmith Equity T Acc	27.72	21.27	21.38	27.72	78.33	163.46	0.94
Marlborough European Multi-Cap P Inc	36	17.49	17.53	36	62.19	124.22	0.96
The MI Discretionary Unit Acc	19.39	12.46	20.68	19.39	42.23	155.94	1.06
Legg Mason IP Japan Equity X	37.07	24.82	29.04	37.07	93.56	257.75	1.28

Filtering options: Cumul. perf., Discrete perf., Financial Express rating, Fund details, Quartiles, Risk metrics.



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

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