

Multiple recommendations within a single product

Money in

Fund switch/rebalance & top-up

- ▶ Both actions must be carried out within the **Top-up** function.
- ▶ Select **Top-up**, add the new investment solutions, add the top-up amount and leave 'All funds and rebalance' selected. Use either the % or £ columns to re-balance the whole portfolio, including the top-up.

Fund switch/rebalance & regular contribution

- ▶ You are not restricted by which action you carry out first. You are free to select either **Fund switch/rebalance** or **Regular contribution** in no particular order.
- ▶ The system will treat this recommendation as a fund switch/rebalance first followed by a regular contribution.

Top-up & regular contribution

- ▶ You are not restricted by which action you carry out first. You are free to select either **Top-up** or **Regular contribution** in no particular order.
- ▶ The system will treat this recommendation as a top-up first followed by a regular contribution.

Money out (investments only)

Fund switch/rebalance & encashment

- ▶ Both actions must be carried out within the **Encashment** function.
- ▶ Select **Encashment**, add the new investment solutions, add the encashment amount and leave 'All funds and rebalance' selected. Use either the % or £ columns to re-balance the portfolio.

Fund switch/rebalance & regular withdrawal

- ▶ You are not restricted by which action you carry out first. However, it is best practice to select a **Fund switch/rebalance** first followed by a **Regular withdrawal**.
- ▶ If you first recommend a regular withdrawal and then a fund switch/rebalance, an error message might appear as the regular withdrawal might not reflect the changes to the available funds.

Encashment & regular withdrawal

- ▶ You are not restricted by which action you carry out first. However, it is best practice to select an **Encashment** first followed by a **Regular withdrawal**.

If you first recommend a regular withdrawal and then an encashment, an error message might appear as the regular withdrawal might not reflect the changes to the available funds.



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