



## Welcome to Selectapension's Autumn/Winter 2011 Newsletter

### SELECTAPENSION GETS READY FOR RDR

The impact of RDR on the whole financial industry will be enormous, so Selectapension have a team in place to ensure the system will be RDR friendly well before the effective date of 1 January 2013. Prior to this you will still have the option to specify payment by commission as well as having complete flexibility to represent the fee you have negotiated with your client.

### 'WINTER WARMERS' SPECIAL OFFERS!

# £50 OFF

We always keep our prices competitive, so, **between now & 31 January 2012**, we are very pleased to offer **£50 off** the annual charge of any additional calculation tools (excluding With Profits & Funds) added to your current subscription.

Interested? Please contact our Sales Team

Tel: 01892 669494

email: [sales@selectapension.com](mailto:sales@selectapension.com)

# FUNDS UNIVERSE

Enhanced fund searches & selection capabilities allow users to increase the speed & efficiency of new investment selection & matching existing schemes' funds. If you do not have this functionality already, you can arrange a **reduced rate between now & the end of 2011** if you include With Profits & Funds on top of your existing subscription.

An example of one of the new investment screens is shown below

The screenshot below is one example of the new funds functionality which shows fund search & selection with the reactive counter for available products.

The screenshot displays a web interface for fund selection. At the top, there are three tabs: "Plan Default Settings", "Specify Investments", and "Defined Templates". Below this, a header indicates "Products Available: 29". A section titled "Sector default fund based on:" includes options for "Performance", "Lowest Annual Charge", "Size", and "Include Own Selections (from Personal Settings)". The main area is split into "Sectors" and "Funds" tabs. The "Funds" tab shows a search interface with fields for "Provider" (set to "All"), "Filter" (set to "Fund Name" with "m&g" entered), and "Sort" (set to "Fund Name"). A list of funds is displayed, including various M&G American, Asian, and Cautious Multi Asset funds. A "Selected Assets" table on the right shows four assets with percentage input fields and red minus buttons: Invesco Perpetual High Income Acc, BlackRock International Bond, M&G Global Macro Bond A Acc, and UK All Companies. A "Save as New Template" checkbox is at the bottom left. Three callout boxes provide additional information: one about the reactive counter, one about search filters, and one about tailoring investments.

**Products Available: 29**

Sector default fund based on:  
 Performance <sup>+</sup>       Size <sup>\*\*</sup>  
 Lowest Annual Charge       Include Own Selections (from Personal Settings)

**Funds**

Provider: All  
 Filter: Fund Name m&g  
 Sort: Fund Name

M&G American A Acc  
 M&G American A Inc  
 M&G American X Acc  
 M&G American X Inc  
 M&G Asian A Acc  
 M&G Asian A Inc  
 M&G Asian X Acc  
 M&G Asian X Inc  
 M&G Cautious Multi Asset A  
 M&G Cautious Multi Asset A Inc  
 M&G Cautious Multi Asset X Acc  
 M&G Cautious Multi Asset X Inc

Funds Returned: 203. Time taken: 1.62 secs.

**Selected Assets**

Asset	Split
Invesco Perpetual High Income Acc	<input type="text"/> %
BlackRock International Bond	<input type="text"/> %
M&G Global Macro Bond A Acc	<input type="text"/> %
UK All Companies	<input type="text"/> %

Save as New Template

**Callout 1:** A reactive counter shows the number of products available at each stage of your selection. A list of the products available & unavailable (with a reason for their unavailability) can be viewed.

**Callout 2:** Find funds by searching by provider name &/ or filter using fund name or ISIN. You also have the ability to sort by fund name; performance; cheapest; fund size & ISIN.

**Callout 3:** You can tailor the new investments based on sectors or funds or a combination of the two until the Selected Assets total 100%. This can be saved & maintained as a template for future use.

## RU64 COMPLIANCE

### FSA REQUIREMENT

Advisers are required to explain to their clients in writing why the plan they are recommending is at least as suitable as a Stakeholder pension.



### COMPLIANCE SOLUTION

Selectapension have introduced the ability to request a comparison with a Stakeholder plan within our Money Purchase, Defined Benefit & Provider Comparison calculators as a standalone report &/or incorporate the comparison within the full report.

## DID YOU KNOW...

### Product Bespoking Service

We offer a Bespoke Plans service that is available for just £240 pa + VAT which allows users to create unlimited plans & charges which can be used within an analysis. Alternatively, Selectapension can create the plan, for your use only, for a one-off fee (these will vary depending on the complexity of the plan). If you do have a product that is tailored to you & are interested in this service, please call now.

### New Providers & Products since our last Newsletter:

#### Providers:



#### Guarantee Products for:

**MetLife**



### We are in the Press

Selectapension are delighted to appear in the trade press, click on the links below for the most recent articles:

<http://www.moneymarketing.co.uk/pensions/drawdown-decisions/1041635.article>

<http://www.pensionsage.com/pa/News-in-brief-07-November.php>

## CONTACT US

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