

Personal Details

MyPortfolio Builder

1 Select Product 2 Personal & Plan Details 3 Assess Risk 4 Build Portfolio 5 Report

Personal Details

Name
Client

Surname
Name ✓

Address
[Empty]

Date of Birth
20/08/1979

Email
clientemail@gmail.com

Phone Number
+44879999999

Back Next

Date of birth is the only field you must populate in order to proceed

Any details added will prepopulate into the report builder and in to MyQuotes. You will have the opportunity to add these detail in the report building phase also.

Plan Details

MyPortfolio Builder

1 Select Product 2 Personal & Plan Details 3 Assess Risk 4 Build Portfolio 5 Report

Plan Details

Payment Amount (Annual)
€ 200,000.00

+ Build your Annual Management Charge

Back Next Save

You can build out your annual management charge

Investment amount can be added

Annual Management Charge

Learn More

Main Premium

AMC
Select AMC

Trail/Fund Commission
Select Trail