

MyPortfolio Builder

Tester McTestFace
2101 - IRISH LIFE ASSURANCE PLC

PRODUCT Savings & Investments
CLIENT My Client
RISK RATING ● Balanced

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

Be My Guide By My Side I'll decide

Back Save

Hovering over these tiles will give a short explanation as to what the feature does. Selecting the tile brings you into that feature

I'll Decide
No pre-population. You select the funds you want and to build custom client profiles

Be my Guide
We match the most compatible funds with your clients risk rating using MAPS or REPS

By my Side
We suggest some blended funds but you have the flexibility to mix and match

This is an entry point only. All portfolios can be configured on Portfolio Screen