

Simple **Solutions** to Complex **Problems**



Data Library Coverage

<u>ADVICE TYPES</u>	
Personal Full Advice	Personal Limited Advice
Business Full Advice	Business Limited Advice
Demands & Needs	Mortgage
Pre-Sale Report	

<u>PRODUCTS</u>	
Rebate Only Personal Pension	Term / Combined Cover
Group PP / Group Stakeholder	Critical Illness
Personal Pension	Serious Illness
Stakeholder Pension	Whole of Life
SIPP – Self Invested Personal Pension	Income Protection
Additional Voluntary Contribution	Regulated Mortgage
Personal Pension Increase	Mortgage Payment Protection Insurance
Venture Capital Trust	Child Trust Fund
Unsecured Pension	Traded Endowment Policy Sales
Phased Retirement	Endowment Assurance
Section 32	Maximum Investment Plan
OEIC	Equity Release
Individual Savings Account	Long Term Care
Unit Trust	Trustee Investment Plan
Investment Bond	Executive Pension
Investment Trust	Group Death in Service
Unitised Annuity	Group Income Protection
Annuity	
ICVC	
Multi Investment Platform	

<u>REPORTS</u>	<u>MISCELLANEOUS</u>
Wraps	Share Exchange
Trusts	Salary Sacrifice
Pension Transfer Report	Discontinued Plans
Unsecured Pension Review	Company Reasoning & Descriptions
At Retirement Report	Risk Analysis
Business Protection Report	Generic Fund Descriptions
	Investment Fund Reviews

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