OLD MUTUAL WEALTH’S ADVISERVIEW
BUILD PORTFOLIOS
USER GUIDE

A detailed guide to help you build portfolios, complete risk questionnaires and build portfolios with suggested asset allocations on AdviserView.
2. Contents
3. Introduction
4. Homepage
5. Portfolio planning tool
6. Full client risk questionnaire
7. Full client risk assessment
8. Quick risk assessment
9. Build methods
10. Old Mutual Investment Management build method
12. Portfolio summary
13. Optimised portfolio build method
15. Own asset allocation
16. Copy an existing portfolio
17. Research funds
18. Portfolio summary
INTRODUCTION

AdviserView’s build portfolios functionality allows you to:

• Complete risk questionnaires and base the portfolio on a specific attitude to risk.
• Build new portfolios with suggested asset allocation.
• Use AdviserView’s research funds functionality to help select the funds. Please refer to the ‘Research funds’ user guide for more information.
• Use a portfolio summary report for an audit trail on how the portfolio was built.
• Access portfolio UScan reports for all portfolios you create. Please refer to the UScan reports user guide for more information.
• Link multiple investments to a portfolio for reviewing, switching and rebalancing. Please refer to the ‘Manage portfolios’ user guide for more information.
**HOME PAGE**

1. From the homepage, hover over the ‘manage portfolios’ tab to view further options.
2. Select the ‘build portfolios’ option to begin the process.
PORTFOLIO PLANNING TOOL

1. Use the drop down menus to select the product category and fund range.

2. If you already know your client’s risk level (1 –10), select ‘Quick risk assessment’ and skip to page 7.

3. To answer risk-related questions and assess your client’s attitude to risk, select ‘Full client risk questionnaire’ and turn to the next page.

4. If you do not wish to assess your client’s attitude to risk, select ‘No’ and skip to page 8 of the user guide.

Tip:
If you use either the Quick risk assessment or Full client risk questionnaire, you can use Old Mutual Wealth’s suggested asset allocation for the risk score given when building the portfolio. Our asset allocations are provided by Towers Watson and are updated quarterly.
FULL CLIENT RISK QUESTIONNAIRE

1. Enter a questionnaire reference if required.
2. For each question, complete the answer that your client agrees with most.
3. Select ‘Continue’ to proceed.

**Note:**
You can print the results of the questionnaire at the end of the process.
FULL CLIENT RISK ASSESSMENT

1. Your client’s risk score will be generated between a scale of 1-10 (1 being the most risk averse and 10 the most risky).

2. Select ‘View’ to open and print the questionnaire and answers provided previously in PDF format.

3. Select ‘Next’ to continue.

Tip:
Once the portfolio has been saved, risk questionnaire answers and risk score results will automatically be saved in the ‘Portfolio review report’.
QUICK RISK ASSESSMENT

1. Use the drop down menu to choose your client’s risk level. 1 being the most risk averse and 10 the most risky.
2. Select ‘Next’ to continue.

Tip:
Use the ‘Help’ option for further information on each step.
BUILD METHODS

1. Choose ‘I wish to delegate the choice of asset allocation and fund manager selection’ to view a list of managed solutions carefully constructed to maximise returns and minimise risk and turn to the next page of the guide.

2. For a recommended asset allocation, based on your client’s attitude to risk and the period over which they want to invest, select ‘Based on Optimised Portfolio modelling’ and skip to page 13 of the user guide.

3. To access the self-build option, select ‘By creating my own asset allocation’ and skip to page 15 of the user guide.

4. To edit an existing portfolio already stored on Adviser View, select ‘By copying an existing portfolio from this fund range’ and skip to page 16 of the user guide.
OLD MUTUAL INVESTMENT MANAGEMENT BUILD METHOD

1. Select the required funds from the list of options.
2. Select ‘Build portfolio with selected funds’ to continue.
1. Enter the percentage allocations to invest.
2. Alternatively, use the ‘Equal split’ option to allocate the percentages equally across all of the funds.
3. Select ‘Save’ to save any information entered. You will be able to continue editing the contents.
4. Select ‘Save and finish’ to view the final portfolio asset allocations.
PORTFOLIO SUMMARY

This page allows you to view the final portfolio.

1. The pie chart displays the listed asset allocations by sector.

2. To view and print a more detailed review of the portfolio select ‘View’ next to ‘Portfolio Review’.

3. For a UScan report, select ‘View’ next to ‘Portfolio UScan’.

4. To make any further amendments, select ‘Edit portfolio’.

5. To end the process, select ‘Exit’.
OPTIMISED PORTFOLIO BUILD METHOD

1. Select ‘Old Mutual Investment Management’ to delegate the selection of fund managers by utilising the Old Mutual Investment Management process.

2. To choose from the full list of funds, click the ‘SelfSelect’ option.

3. Select ‘Continue’ to proceed.
CHECK YOUR INSTRUCTION

1. The target sector allocations will appear reflecting the client’s attitude to risk. Use these as a guide to adding the funds and percentages to the portfolio.

2. Select ‘Add funds’ and skip to page 17 of the user guide.

Note:
You can change the target percentage however, any changes made to the suggested asset allocation model will be recorded in the portfolio’s reports.
OWN ASSET ALLOCATION

1. Select ‘Old Mutual Investment Management’ to delegate the selection of fund managers by utilising the Old Mutual Investment Management process.
2. To choose from the full list of funds, click the ‘SelfSelect’ option.
3. Select ‘Continue’ to proceed.
4. On the next page, ‘Build portfolio’, select the ‘Add funds’ option and skip to page 17 of the user guide.

Note:
You can change the target percentage however, any changes made to the suggested asset allocation model will be recorded in the portfolio’s reports.
COPY AN EXISTING PORTFOLIO

1. Enter the existing portfolio name and select ‘Go’.
2. Alternatively, use the ‘prev’ and ‘next’ buttons to toggle between pages.
3. Select the portfolio you wish to use.
4. Click ‘Continue’ to proceed and skip to page.
RESEARCH FUNDS

1. Use the ‘Fund name search’ tool and select ‘Go’.
2. Expand the market sectors by clicking the ‘plus’ buttons.
3. Select the requested fund.
4. Funds selected for your portfolio will be listed within the ‘Fund basket’.
5. Uncheck the tick boxes to remove any unwanted funds, from the ‘Fund basket’.
6. Once all required funds have been selected, click ‘Build portfolio with selected funds.’

Tips:
- Click on the fund names in green to access their fund fact sheets.
- Select ‘view on a single page’ to view all sectors on the same page. See point 7.
PORTFOLIO SUMMARY

You can link your client’s policies to the portfolio you have built, and switch and/or redirect them into the portfolio at the same time. If you make changes to the portfolio in the future, you can quickly update all the linked plans too.

1. To link client policies to a portfolio, select ‘Work with unlinked plans’.

Note:

You can only switch, redirect or rebalance plans into your portfolios once those plans have been linked. (To view how many plans are linked to the portfolio see point 2).
If you require any further training or assistance with AdviserView, please contact your E-Business Specialist or Old Mutual Wealth consultant, call our Customer Contact Centre on 0808 171 2600 or email ask@omwealth.com.