How to split your investments into multiple portfolios

When viewing the valuation reports on clarityONLINE you may want split on your investments into multiple portfolios. By default Pension, Non Pension portfolios and All Holdings portfolios are created automatically for you. This help guide shows you how to create your own custom portfolios and set the default reporting portfolio across clarityONLINE.

1. Go to the Portfolios tab to create your custom portfolio

clarity	VALUATION INFORMATION NEWS RESEARC	h calculators downloads o 🤌
clarityCNLINE → Valuation / Your Online Valuation Your Online Val	\frown	weath Plans
	You have 1 unread Secure Message(s)	
Ja	hn clarity: All Holdings 🔶	
	utomated data feeds as well as any self managed holdings $u_{min} ~ ~ \mp ~Guided tour of this page. ~ := Add/update va$	
고 Historical Valuations 소 ISIN	codes and reports for the 'All holdings' portfolio Codes Transaction History A Download Report	⇔ Printer Friendly Report
Policies included in your IMS Portfolio are highlighted with	the 🗸 IMS icon. If you would like to make changes to your IMS	Portfolio please contact your usual adviser.
Portfolio: Pertfolie: All Holdings CBP 0	+ Add a new Asset	Add a new Liability

2. The click on the Create a new portfolio button



3. Add a Portfolio Name and select the holdings

hn clarity associated with	i <u>PwC</u> , Checkpol	nt reporting is enabled for you only			A Invest	
	Create/Edit	Portfolio		×		
Your Online valuation	Portfolio Name:	My Property			LATORS	DOWN
^f olio M	John clarity					
	Pension Ho	oldings				
nary Asset Allocation		Cofunds Pension Account	£1,247,520.98	۹	lans	
_	Non Pensio	on Holdings			_	
os for John e portfolios section of c		Aegon Stocks & Shares ISA	£179,487.10	۹		
ed holdings you have (re fixed. The benchmar		Example ISA	£10,577.70	۹		Need
set/update a specific l		Main Residence	£300,000.00	۹		
ew portfolio						

4. Select Add Portfolio to save

is default Liabilit		Aegon General Investment Account	£0.06	۹	Set Benchmark
lio	Liabilities			_	_
is default IMS PC		Car Ioan Mortgage on Main Property	£-10,000.00 £-220,000.00		Update Benchmark
s default Tax Fr			Add Portfolio	Close	Set Benchmark

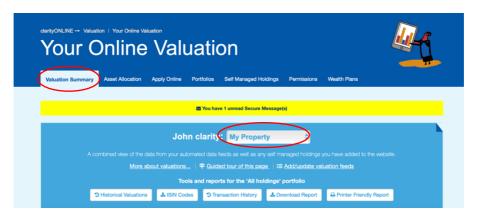
5. Set or update a benchmark

Set as default	Tax Free Investments Edit	£1,427,008.08	۹	Set Benchmark	8
Set as default	School Fees Edit	£0.00	۹	Update Benchmark	8
Set as default	Cash tot	£29,000.00	۹	Set Benchmark	8
Set as default	Exclude house Edit	£1,427,008.14	۹	Set Benchmark	8
Set as default	ABC portfolio Edit	£29,000.00	۹	Set Benchmark	8
Set as default	My Property Edit	£80,000.00	۹ (Update Benchmark	8
	+ Create a new p	ortfolio		\smile	

6. Enter the details and Save Changes

clarity		Set/Update Portfolio Benchmark - My Property X	LATORS DOWNLOADS	• 2
IMS Portfolio		Please use the inputs below to set your portfolio benchmark. If you are on a clarity service we will suggest a 'best fit' target asset allocation based on your risk score, which can be used as a benchmark for your investments.		
Set as default	IMS Po	If you would like to learn more about asset allocation benchmarks please see our research note on asset allocation.	Update Benchmark	
Existing Portfolios		Fixed Interest Equity Property		
		0.00 100.00		
Set as default	Tax Fr		Set Benchmark	ê
Set as default	Schoo	European Far East Japan Emerging Specialist UK Equity US Equity Equity Equity Equity Markets Equity 100.00 0.00 0.00 0.00 0.00 0.00 0.00	Update Benchmark	8
Set as default	Cash		Set Benchmark	ê
Set as default	Exclud	Please Note: The information stored on this website is intended as a starting point and an aid for discussions with your clarity adviser, who will also take into account your particular circumstances and preferences before giving any formal advice.	Set Benchmark	8
Set as default	ABC p	oncommentered and presentered before grang any formal autoes	Set Benchmark	ê
Set as default	My Pro	Beve Changes Pist Profiler Cancel	Update Benchmark	ŝ
		+ Create a new portfolio		

7. Return to your Valuation Summary



8. Select the new portfolio from the drop down pictured above to view the new portfolio

Summary	Assets Liab	ilities					
Valuatio	on History:	0	12 Months \$		ets Vs Liab		
£90K ·····		0		£310K	£300K		
£72K ·····				£248K	 £220	(
£54K ·····				£186K			
£36K ·····				P124K			Liabilities
£18K							
03		ß		£62K			
		86.07.50		60	Current Value		
Valuation D	ate O						08-10-2020 (fais