

Aviva Platform – guide to client report bespoking

Contents

1. **Creating Firm and Adviser templates**
2. **Firm Branding**
3. **Template selections**
4. **Benchmarking**
5. **Template content**

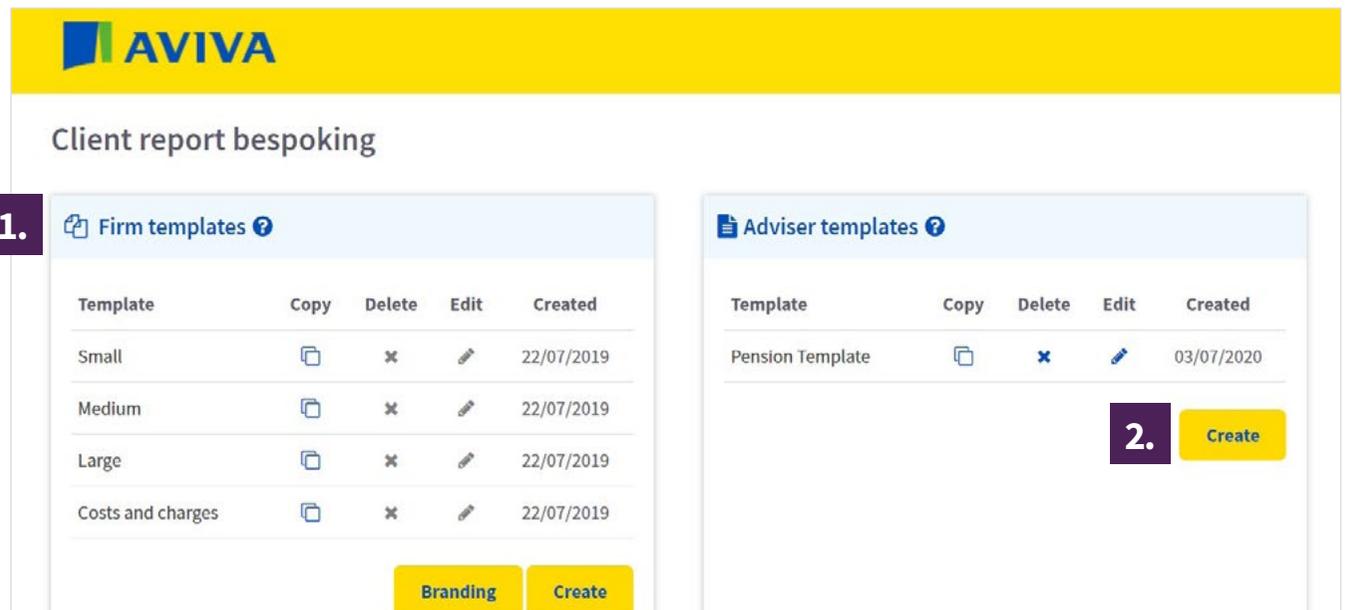
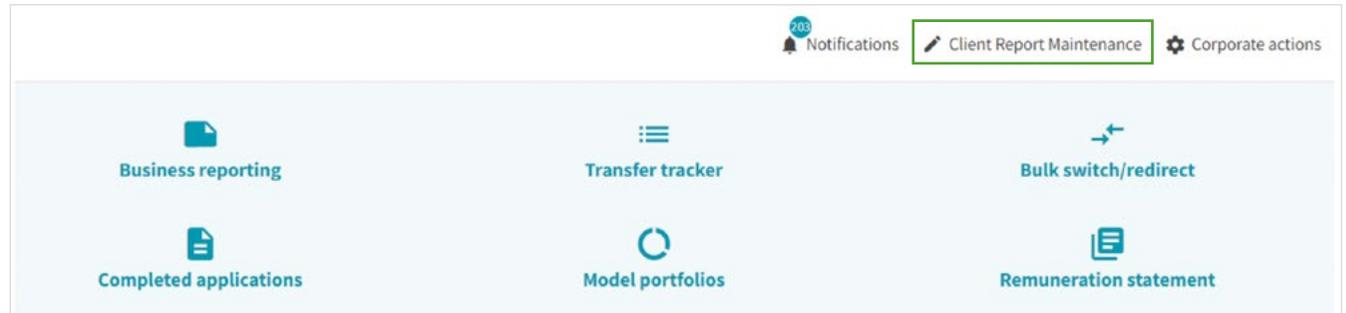


Creating Firm and Adviser templates

1. When using firm templates, you'll be presented with three default templates (small, medium, large and costs and charges). You can copy the existing templates to create your own bespoke versions. The default templates cannot be deleted or edited.
2. If you don't want to use the default templates, you can create your own firm and adviser templates by clicking the "Create" button.

Note: Firm level templates are available for all clients associated with the adviser firm. Adviser level templates are only available for clients belonging to that specific adviser.

You can access the client report templating suite via Platform Services by clicking on the Client Report Maintenance link.



Branding

3. You can choose to add your firm's branding to your client reports. Simply click on the "Branding" button under the "Firm templates" section. To upload your firm logo, click on the "Add your firm logo here" button. The uploaded image should be in JPEG or PNG format only, with a maximum file size of 585 x 359 pixels.
4. You can edit and amend the title that will show on the report before saving.
5. Once your firm logo has been successfully uploaded, it will appear in the top right-hand corner of the client report (as shown opposite).

Swansea Financial Services Ltd

Firm Branding

Page header logo ⓘ : **3.**

Firm name : **4.**

Save **Cancel**

AVIVA **5.** Adviser Firm Logo here

 **Total payments in/out**
£84,918.36

Template selections

6. The next thing you'll see when creating a new firm or adviser template, is a tab labelled "Template selections".
7. On this tab, you can choose the products you want to appear on the report by ticking/unticking the boxes. You can also alter the order the products appear in by clicking on the dots on the left-hand side and dragging up or down.
8. You can add bespoke comments by selecting the "Report comments", "Comments" and "Additional comments" icons and adding in your commentary before clicking the "Save" button.

Note: "Report comments" will appear at the beginning of the report. "Comments" will be shown within the main body of the report at product level. "Additional comments" are for any closing comments you might want to add at the end of the report.

Swansea Financial Services Ltd

Template : Pension

6. Template Selections Template Content

Account Types and Comments

Please select the accounts that you want to appear on the report, and re-order as required. Also please enter any default comments that you want to appear on the report comments page, at the top of each accounts page, and/or on the performance page. This default text can be overwritten when generating a report.

Report comments

7. ISA Portfolio Investment Portfolio Pension Portfolio Pre Retirement Pension Portfolio Post Retirement

Comments

Additional comments

Add Comments 8.

Comments

Save Cancel

Benchmarking

9. You'll be given three options to set as a benchmark that will be used for the performance charts on the report – “Single instrument”, “Weighted sector average” and “Composite benchmark”. Please note: the benchmark default is always set to the Bank of England base rate.
10. Click the Single instrument option to change the benchmark. This can either be a single index or an individual sector. Once you have selected your instrument, click the ‘Save’ button.
11. You can add individual sectors one at a time by selecting and pressing the ‘Add’ button. You then need to apply weightings to each instrument ensuring they add up to 100%. Click ‘Save’ to complete your bespoke composite benchmark.

9. Select Benchmark:
Please select the benchmark that you would like to be used for performance charts on the report.

Current benchmark: Bank Of England Base Rate

10.

- Single instrument (Sector Average, Index)
- Weighted sector average
- Composite benchmark

Single Instrument (Modal 1)

Please select a benchmark (you can only select one)

- Index
- Sector Average

Bank Of England Base Rate

Save Cancel

Single Instrument (Modal 2)

Please select a benchmark (you can only select one)

- Index
- Sector Average

Select Sector

Save Cancel

+ Create Composite Benchmark

Save Cancel

11.

Composite Benchmark

Please select a Sector to add to the composite benchmark. Then click 'Add' and input the weighting. Also, please edit the benchmark name if required. Once you are ready to continue, please click 'Save'. Please note weighting must total 100%.

Benchmark Name:

Select sector:

Add

Adjust instruments weighting

Instrument	%
PN Asia Pacific excluding Japan Equities	<input type="text" value="34"/> % <input type="button" value="x"/>
PN Deposit & Treasury	<input type="text" value="33"/> % <input type="button" value="x"/>
PN Europe including UK Equities	<input type="text" value="33"/> % <input type="button" value="x"/>
Total	100 %

Save Cancel

Template content

12. Within this tab, you can dictate the layout of your client reports. You can turn on/off specific sections by ticking/unticking the relevant pages. You can also change the order the pages appear in by clicking on the dots on the left-hand side and dragging up or down.

Note: you'll notice that the "Summary" and "Important information" pages are greyed out and can't be moved. They will appear as the opening and last pages respectively.

13. You can also include page numbers, using the tick box displayed on the right-hand side.

Note: Once you have saved your template, you will need to manually refresh your browser for any changes to take effect.

AVIVA for Advisers

Swansea Financial Services Ltd

Template : Pension

Template Selections | **Template Content**

Please select the pages that you would like to appear on the report.

12. Summary page [Preview](#)

Total payments page [Preview](#)

Fees and charges page [Preview](#)

Total performance page [Preview](#)

Total breakdown page [Preview](#)

Additional investment information page [Preview](#)

Account holdings page [Preview](#)

Account payments page [Preview](#)

Income page [Preview](#)

Costs and charges page [Preview](#)

Account performance page [Preview](#)

Account transaction history page [Preview](#)

Important information page [Preview](#)

13. Page Numbers

Any questions?

For more information on creating Aviva Platform client reports, see our **Adviser Guide to the Aviva Platform Client Report**.

If you have any further questions, get in touch with your usual Aviva contact.