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How to create an Illustration



The Dominion Team

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The *illustrator* is a **tool** that is part of the DCS platform and is available to **advisers and their staff**. To access it, you must go to the “*Illustrator*” tab that appears on the left-hand section of the platform.

Below you can find a step by step process of **how to create an illustration**.

1) Client Information

To begin with, you need to specify the **names and surnames** of the accountholder(s).

2) Product Selection

Then, you need to indicate the **type of product** selected for the account (**My : Savings Strategy** or **My : Investment Strategy**).

3) Contribution

The contribution **amount** must be entered on both product illustrations, My : Savings Strategy and My : Investment Strategy.

On the **My : Savings Strategy** (regular contributions) illustrations it is also necessary to indicate the **frequency** (monthly, quarterly, half-yearly or annually) and the **term** (from 5 to 20 years, etc.).

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which the contribution commitment will be maintained.

3 Contribution

USD Contribution

Frequency

Term

On the **My : Investment Strategy** (single contributions) illustrations, the selected term will refer to the estimation made with regard to the number of years that the client will continue with the investment; however, it is not a commitment itself. The **minimum term is 5 years**, within this period the costs of this type of investment will be deducted.

3 Contribution

USD Contribution

Period

4) Risk Profile / Rate

In this section of the illustration, you will select the strategy to be used; it is at the adviser's discretion. There are three default profiles:

1. **Aggressive** Profile: illustrates based on a **9% pa rate**.
2. **Balanced** Profile: illustrates based on a **7% pa rate**.
3. **Cautious** Profile: illustrates based on a **5% pa rate**.

You can also opt to **illustrate a different rate from the default ones** (range between 3% and 9%).

5) Single contribution

It is possible to add single contributions throughout the plan by using the “*Add single contribution*” button that is located at the bottom of the illustrator page.

On the **My : Savings Strategy** illustration, it is possible to add **single initial contributions and/or future single contributions**.

On the **My : Investment Strategy** illustration, it is only possible to add **future single contributions**. Unlike initial contributions, future single contributions don't represent a commitment for the client.

Commission Rebate: on the top right hand corner of the illustrator screen (next to the “*Create illustration*” button), there is an icon that allows you to set a partial or total rebate of commission.

The **rebate options** are **50%** or **100%** of the commissions due to the adviser related to the client's contribution commitment. Hence, the **costs of the product for the client** will be proportionally **reduced** according to the percentage rebated by the adviser.

To proceed with the rebate, the percentage to be rebated needs to be specified in the field under the “*Contribution*” section of the illustrator. If the account includes a regular and a single contribution, the

commission rebate will need to be confirmed separately. The rebate of commission with regard to the single contribution should be entered under the “*Single contribution*” section of the illustrator.



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English (US)



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