

DESIGNING A CIRP : WHAT'S IT ALL ABOUT?



Product Governance (PROD) is the driver of a solid CIRP

CLIENT SEGMENTATION

BASED ON CLIENT NEEDS AND GOALS

FINANCIAL INSTRUMENTS

PRODUCTS / PLATFORMS / INVESTMENTS

Ensure you have the right instruments for the right client (or client segment)

THREE STRATEGIES



ACCUMULATION / DECUMULATION / ESG

- Create Capital From Income
- Create Income From Capital
- Environmental, Social and Governance

DESIGNING A CIRP : CHECK THESE OUT

- Factsheets 011 & 012
- Finalised Guidance FG11/5 and FG12/16
- The Consumer Duty FG22/5
- Thematic Review TR24/1



PROD drives a CIRP

Manage risk effectively



Research is essential

Review frequently

Website



www.opendoorpolicy.co.uk

Email



info@opendoorpolicy.co.uk