

Creating strategies in the Assets category

Strategies can be created in the *Strategies* category, but did you know that they can also be created easily within the *Assets* category?

Follow the steps outlined below to quickly create your strategies within the *Assets* category.

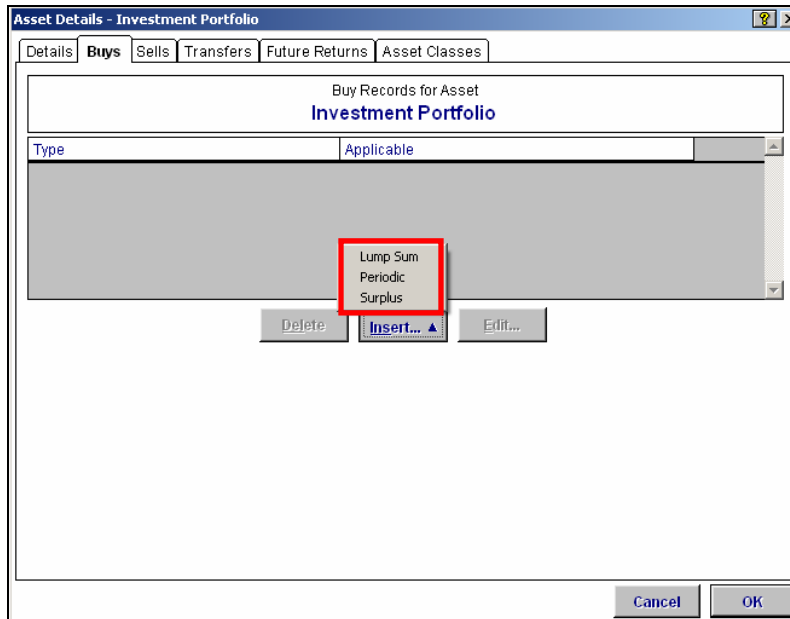
1. Create an asset or edit an existing non-registered or registered asset. Go to the **Assets** category – **Non-Registered** or **Registered** tab.
2. Double click an asset to open that asset’s dialog box. Alternatively, click the **Insert** button to create an asset.
3. In the asset’s dialog box, go to the **Buys** tab.

The screenshot shows the 'Asset Details - Investment Portfolio' dialog box with the 'Buys' tab selected. The 'Buys' tab is highlighted with a red box. The dialog contains the following sections and fields:

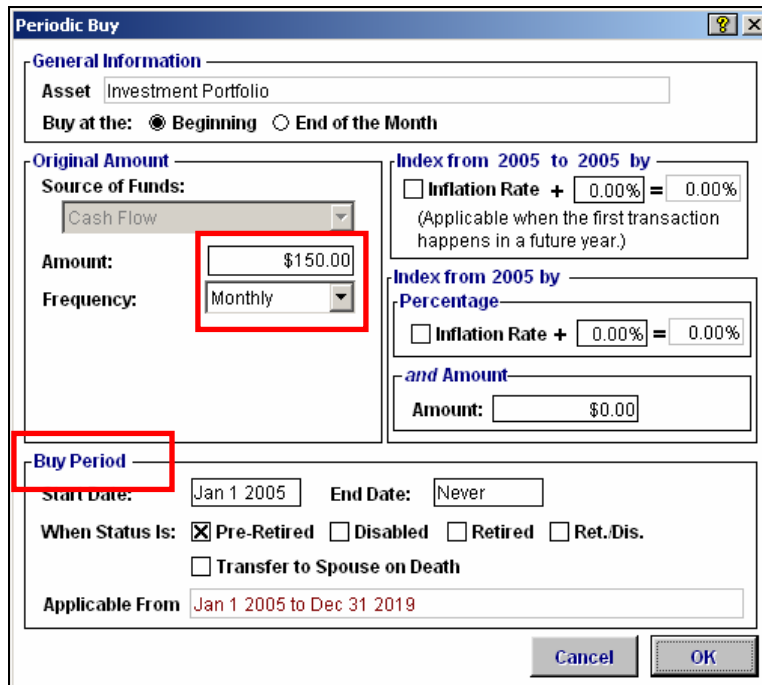
- General Information:** Name: Investment Portfolio - Savings; Ownership: Joint; Type: Non-Reg.; Hold Status: 0% to hold; Purchase Date: Dec 31 2004.
- Purchase Information:** Purchase Amount: \$50,000.00.
- Previous Purchase:** If purchased before 2005, enter the following as of Jan 1 2005; Market Value: \$53,000.00; Adjusted Cost Base: \$50,000.00.
- Base Return Rates:** Interest: 1.0000%; Dividends: 2.0000%; Growth Rate: 2.0000%; Capital Gains: 2.0000%; Standard Deviation: 0.0000%; Frequency: Annual; Reinvest: Reinvest All; Override.
- Current Value:** As of Jan 1 2005; Market value is: \$53,000.00; ACB is: \$50,000.00; Sale Date: Never; Market Value includes accrued interest.

Note: Market Value should include all other accrued income.

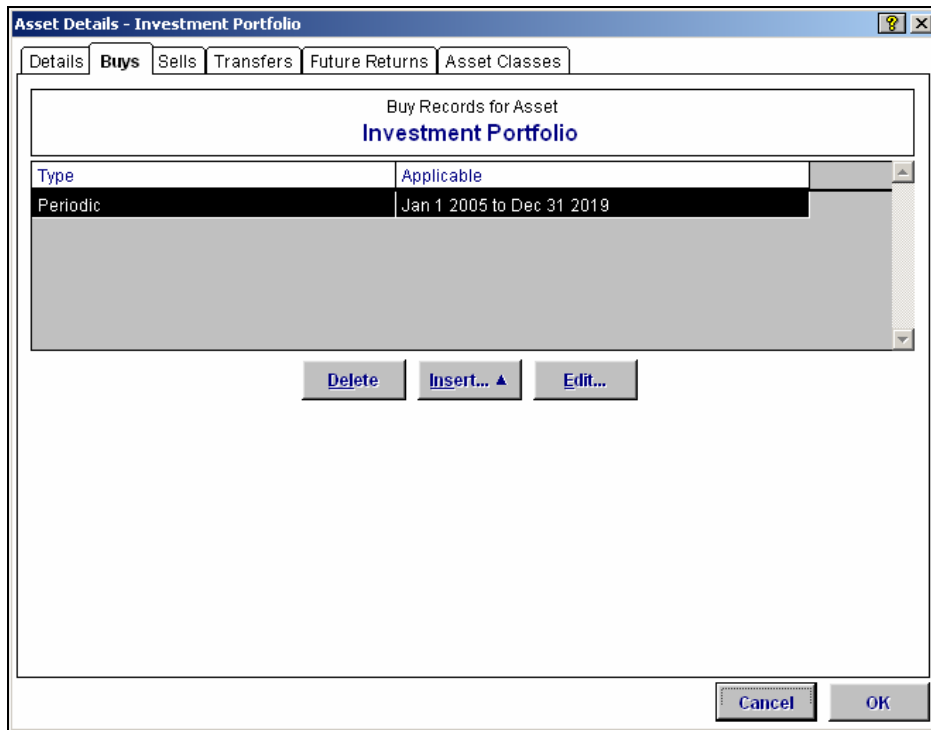
4. Click the **Insert** button.
 - Select **Lump Sum** for a one-time contribution to the asset, or
 - Select **Periodic** for a regular contribution, or
 - Select **Surplus** for contributions to be made with any available surplus cash



5. Enter the savings details. To index the savings by inflation, select the appropriate *Index from* check box(es), and then click **OK**.



- Verify the *Buys* subtab to ensure that the information has been accurately entered. Click **OK**.



- The newly created strategy also appears in the *Strategies* category, where it can also be verified and edited.

