## Creating an Off-Platform Holding

Last Modified on 25/05/2022 4:44 pm BST

Holdings can be found within a Contact record.

Create a New Contact or load an existing record:



This will open the contact record.

Click into the **Holdings** tab and click **New** under the Off-Platform Holdings area:

Synaptic Pathways Home Contacts V Research V Portfolio Builder V	Q. Search Investment Pathways Configuration Fund Lists V Knowledge Ba	sse My Apps & Settings Valuations
Contact           Ms. Client Test           Title         Account Name           Phone (2) ♥         Email           Contact Owner	anne - Anne Alt - 222 e shi ti to ssino anne -	+ Follow Edit New Contact New Opportunity V
Related     Details     Holdings       Holdings     Holdings       We found no potential dumenter of this Contact.       Attitude To Risk Questionnaires (0)	New	Change Owner  Recent Items (2)  Risk Questionnaire. Cortact Jane Doe  Risk Questionnaire Cortact Jane Doe
Risk Illustrations (0)  Research (5+)  5- nems - Updated a few seconds ago	New C New	Change Owner Activity Chatter Change Owner New Task New Event Log a Call Email
Illustration Name      Research Type      Des     Inst Illustration     Comparison with Examp     Test	cription V Activity Due Date V Last Modified	I By Create a task Add
Comparison multi-charge disc Comparison multi-charge disc Test Comp with examte Test Pension Switch Test Co-Ante Test Co-Ante	Closed power local         Of VMI 2022         Anny Paulsen           : description         27/04/2022         Anny Paulsen           Description         30/04/2022         Anny Paulsen           :         30/04/2022         Anny Paulsen	Filters: All time + All activities + All types      Filters: All time + All activities + All types      Refresh + Expand All + View All     V Upcoming & Overdue
5 Test Illustration. Comparison with Ex-ante Test	t Description 30/04/2022 Amy Paulsen	No next steps.     To get things moving, add a task or set up a meeting.
Opportunities (0)		No past activity. Past meetings and tasks marked as done show up here.
javascriptvoid(0)	New	Change Owner

Enter the details of the holding.

Start by entering the provider, type basis & product. As you start typing, a list of options will appear in a drop down box:

	Add Holdings	·
create a holding, choose the holding type, n enter the holding details manually.		
* Describer	* Ture David	* Deck et
Provider     Search Providers	Search Type Basis	Product     Search Products
Q Scalar Hondels		C Scalen Houces
* Holding Name	Status	Contract Reference
	Select an Option	
Description		
		l)
* Enter Remaining Term (In Years) 🕚		
* Enter Remaining Term (In Years) 🌘	Rol	ling Term
* Enter Remaining Term (In Years)	Rol	ling Term
* Enter Remaining Term (In Years) ①	End Date	ling Term
* Enter Remaining Term (In Years) ①	End Date	ling Term

* Provider		* Type Basis	* Product
Q Search Providers		Q Search Type Basis	Q Search Products
Synaptic	•		
Synaptic			
Synaptic			
Aegon Platform	-		
+ New Provider			
	_		
Provider		* Type Basis	* Product
Q AEGON	×	Q Search Type Basis	Q Search Products
		E la sur a Danuda una	

* Provider	* Type Basis	* Product
Q AEGON X	Q Search Type Basis	Q Search Products
	Synaptic	
	Personal Pension (Fully Insured) Synaptic	
	Self Invested Personal Pension (Full) Synaptic	
	Self Invested Personal Pension (Hybrid) Synaptic	
	+ New Type Basis	

* Provider		* Type Basis		* Product
Q AEGON	×	Q Personal Pension (Fully Insured)	×	Q Search Products
				Aegon One Retirement Synaptic
				+ New Product

## If you cannot find the provider/basis/product, add manually:

Provider	* Type Basis	* Product	
Q Search Providers	Q Search Type Basis	Q Search Products	
Synaptic	•		
Synaptic			
Synaptic			
Svnaptic	•		
+ New Provider			

viders	iders Q Search Type Basis Q Search Produ		
vider.			~
		Add New Record	
ire	Provider Test Provider	Type Basis Pension (fully insured) TEST	Product Test Product Type
		Cancel Save	

Complete further details of the holding:

n enter the holding details manually.		norm produces for everything ess, it you can't find you produce
* Provider	* Type Basis	* Product
Q AEGON X	Q Personal Pension (Fully Insured) ×	Q Aegon One Retirement X
* Holding Name	Status	Contract Reference
Aegon One Retirement   Fully Insured	Select an Option	
Description		
	Notional	
	Proposed	&
	Paid Un	
* Enter Remaining Term (In Years)  🕕	Transferred	
	Cancelled	
* Start Date	End Date	
		曲

Add Holdings						
* Provider Q AEGON X	* Type Basis Q Personal Pension (Fully Insured)	Product     Q Aegon One Retirement X				
* Holding Name Aegon One Retirement   Fully Insured	Status In force	Contract Reference 7TH98L				
Description Test Holding Description						
* Enter Remaining Term (In Years)						
10 * Start Date 18 Mar 2022	End Date	**				
Review Date 18 Mar 2023	Surrender/Transfer Value					

Save

Synaptic Pathways Home	All ♥         Q. Search           Contacts ∨         Research ∨         Portfolio Builder ∨         Investme	nt Pathways Configuration	Fund Lists 🗸 Knowledge Base	بر الله الله الله الله الله الله الله الل		
Holding Acgoor One Retirement   Fully Insured       Review       Edit       Delete         Client       Current Value       Current Risk Rating         Test Client       £0.00						
Details Underlying Assets	Performance History			Weighting By Funds Chart not available		
Name Aegon One Retirement   Fully Insured Provider Name AEGON Status In force	Description Test Holding Description Type (Basis) Name Product Name Personal Pension (Fully Insured) Aegon One Retirement Contract Reference 7TH98L	Start Date 18/03/2022 Remaining Term 10 Rolling Term Basis Surrender/Transfer Value	End Date 18/03/2032 Review Date 18/03/2023 Last Modified Date 18/03/2022, 13:03	Performance Chart We cant draw this chart because there is no data.		
Contributions (0)			New	View Report As of Today at 1203 (d' Weighting By Class Allocation Chart not available		

For further information on Off-Platform Holdings, see article Off-Platform Holdings - Underlying Assets