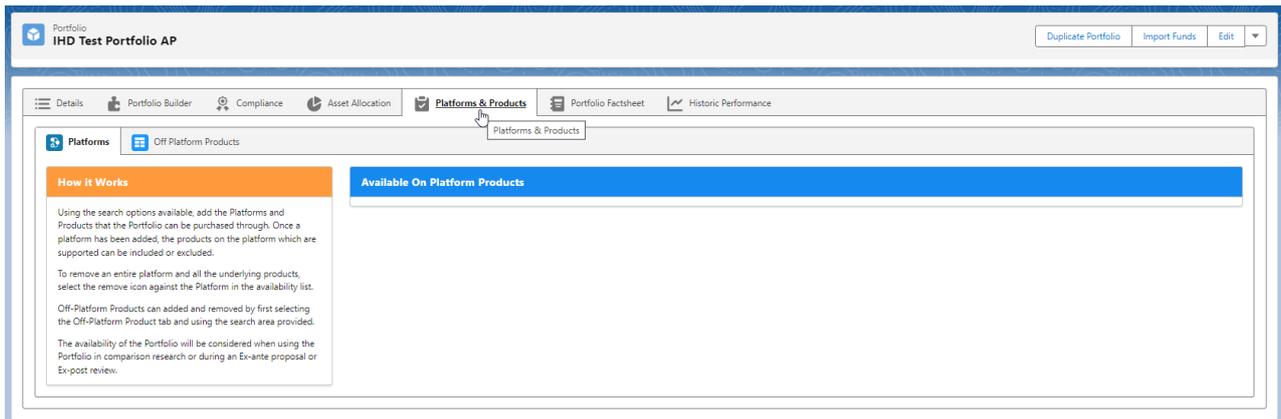


In-House Discretionary - Platforms & Products

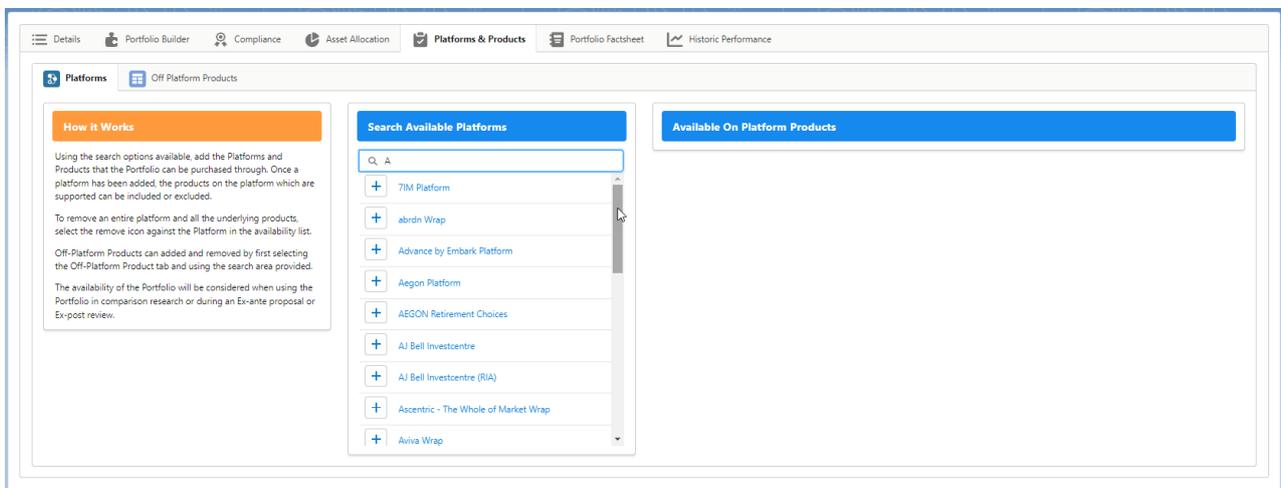
Last Modified on 19/10/2023 1:07 pm BST

This article is a continuation of [In-House Discretionary - Asset Allocation](#)

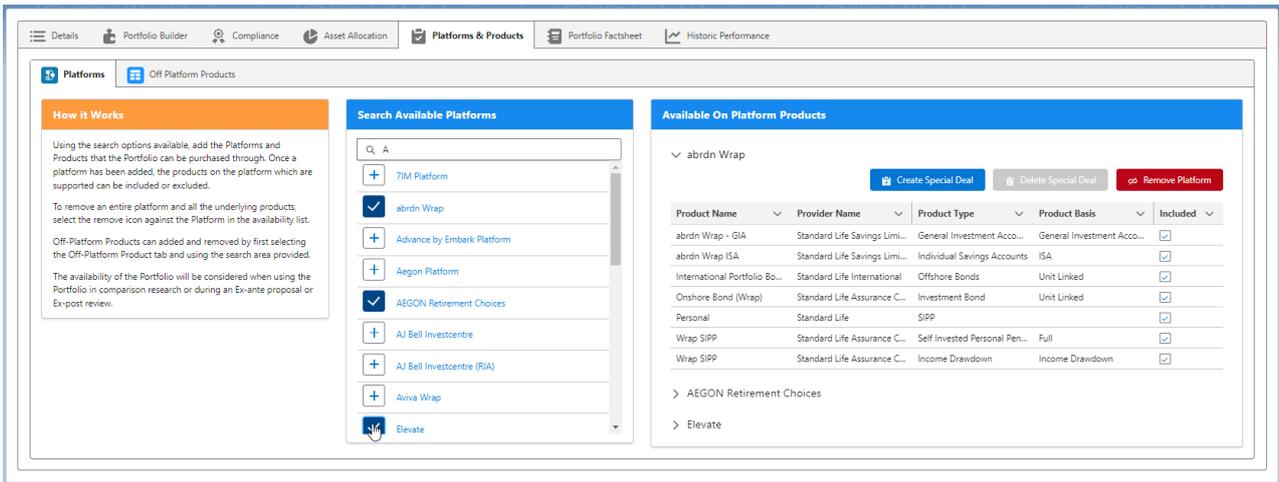
In an In-House Discretionary Portfolio, you are able to add Platforms and Products that the product can be purchased through.



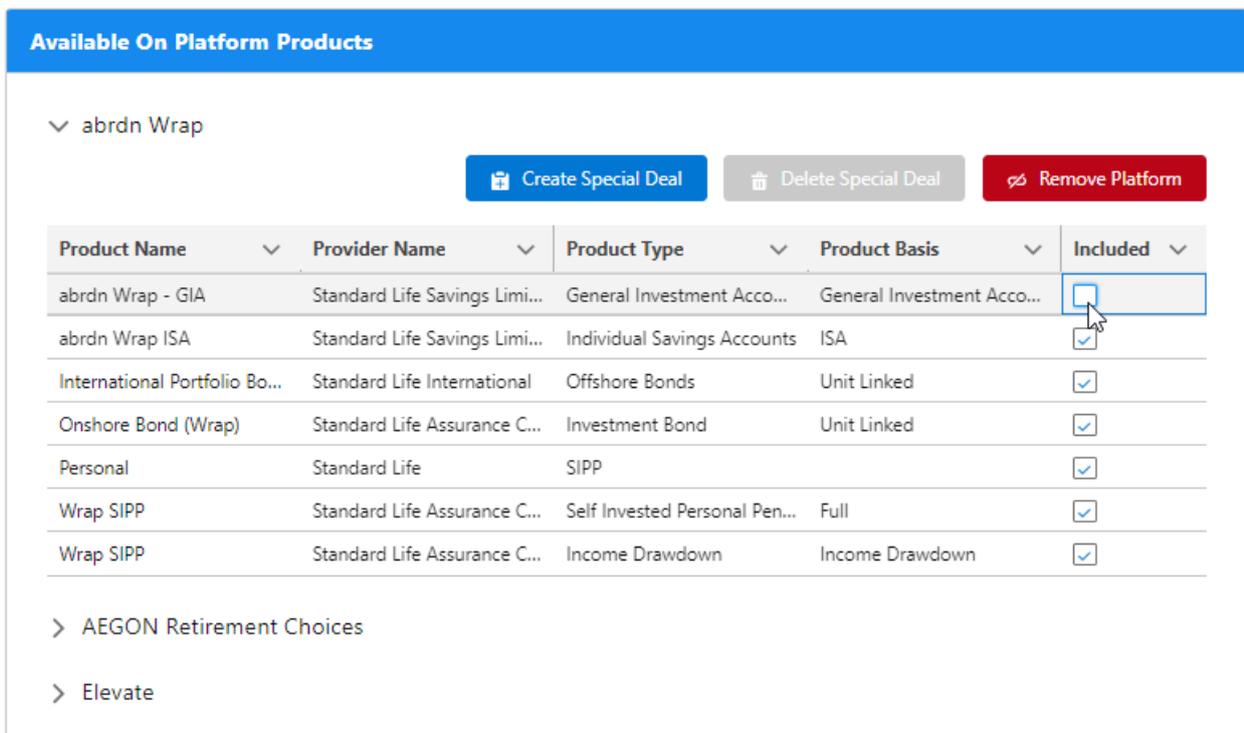
Use the Search box to find available platforms:



Click the + button to select the Platform:



Once added, products under the platforms can be excluded/included:



As Platforms are added, they will appear minimised. They can be maximised and minimised through the arrow on the left side:

Available On Platform Products

▼ abrdn Wrap

Create Special Deal
Delete Special Deal
Remove Platform

Product Name	Provider Name	Product Type	Product Basis	Included
abrdn Wrap - GIA	Standard Life Savings Limi...	General Investment Acco...	General Investment Acco...	<input type="checkbox"/>
abrdn Wrap ISA	Standard Life Savings Limi...	Individual Savings Accounts	ISA	<input checked="" type="checkbox"/>
International Portfolio Bo...	Standard Life International	Offshore Bonds	Unit Linked	<input checked="" type="checkbox"/>
Onshore Bond (Wrap)	Standard Life Assurance C...	Investment Bond	Unit Linked	<input checked="" type="checkbox"/>
Personal	Standard Life	SIPP		<input checked="" type="checkbox"/>
Wrap SIPP	Standard Life Assurance C...	Self Invested Personal Pen...	Full	<input checked="" type="checkbox"/>
Wrap SIPP	Standard Life Assurance C...	Income Drawdown	Income Drawdown	<input checked="" type="checkbox"/>

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To remove a Platform and all the underlying assets, unselect the Platform:

Search Available Platforms

Q A

- 7IM Platform
- abrdn Wrap
- Advance by Embark Platform
- Aegon Platform
- AEGON Retirement Choices
- AJ Bell Investcentre
- AJ Bell Investcentre (RIA)
- Aviva Wrap
- Elevate

Available On Platform Products

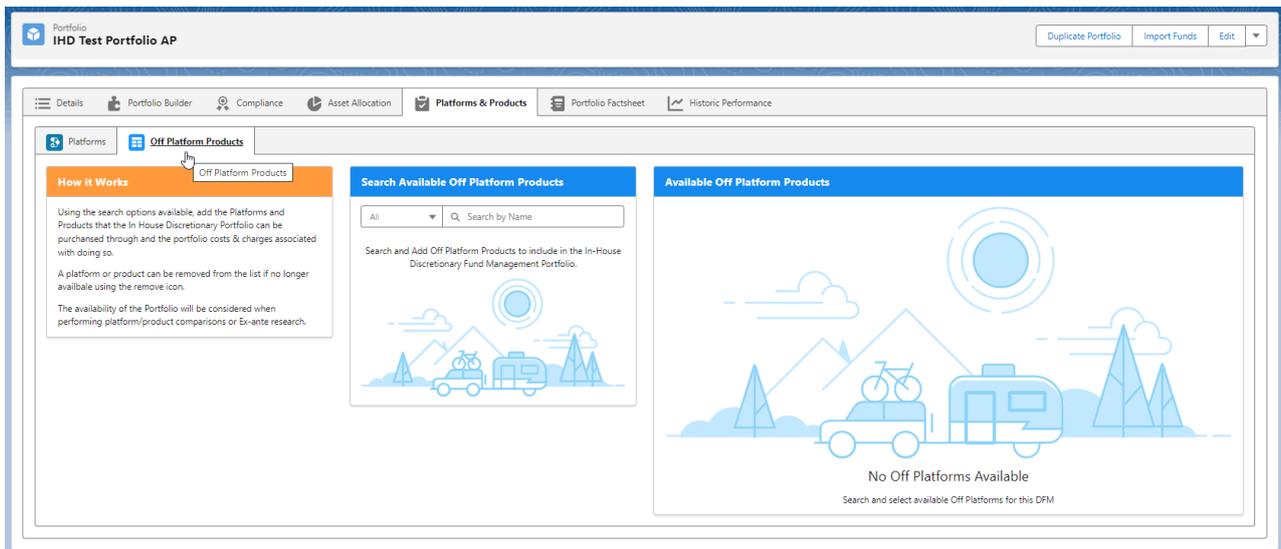
▼ abrdn Wrap

Create Special Deal
Delete Special Deal
Remove Platform

Product Name	Provider Name	Product Type	Product Basis	Included
abrdn Wrap - GIA	Standard Life Savings Limi...	General Investment Acco...	General Investment Acco...	<input type="checkbox"/>
abrdn Wrap ISA	Standard Life Savings Limi...	Individual Savings Accounts	ISA	<input checked="" type="checkbox"/>
International Portfolio Bo...	Standard Life International	Offshore Bonds	Unit Linked	<input checked="" type="checkbox"/>
Onshore Bond (Wrap)	Standard Life Assurance C...	Investment Bond	Unit Linked	<input checked="" type="checkbox"/>
Personal	Standard Life	SIPP		<input checked="" type="checkbox"/>
Wrap SIPP	Standard Life Assurance C...	Self Invested Personal Pen...	Full	<input checked="" type="checkbox"/>
Wrap SIPP	Standard Life Assurance C...	Income Drawdown	Income Drawdown	<input checked="" type="checkbox"/>

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Off-Platforms products can be added and removed through the Off-Platform tab:



The availability of the portfolio should be considered when performing platform/product comparisons or ex-ante research.

Once you have added the platforms & off-platform products to the portfolio, the costs & charges associated with the portfolio will be pulled through when conducting research.

A special deal can be added for each platform/product added. This will allow you to create a deal specific to the use of the In-House Discretionary Portfolio in Research.

For further information on Switch research, see article

[In-House Discretionary - Portfolio Factsheet](#)