

Generic Holdings - Withdrawals

Last Modified on 20/06/2022 12:19 pm BST

This article is a continuation of [Generic Holdings - Contributions](#)

Add withdrawals to a generic holding by selecting **New**:

The screenshot shows the Synaptic Pathways interface for a holding named 'Test Personal Pension'. The top navigation bar includes 'Synaptic Pathways', 'Home', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. The holding details section includes fields for Name, Description, Start Date, End Date, Remaining Term, Review Date, Provider Name, Type (Basis) Name, Product Name, Status, Contract Reference, and Surrender/Transfer Value. Below this is a 'Contributions (1)' table with columns for Contribution Id, Record Type, Frequency, Amount, Indexation, Start Date, and End Date. A 'New' button is visible next to the 'Withdrawals (0)' section.

Select **Regular**, **Single** or **Transfer**:

The 'New Withdrawal' dialog box is displayed, showing the 'Select a record type' section. The options are: Regular (selected), Single, and Transfer. The dialog also includes 'Cancel' and 'Next' buttons at the bottom right.

Complete the details of the withdrawal:

New Withdrawal: Regular

Withdrawal Details

* Amount

* Frequency

Indexation ⓘ

* Start Date

* Holding

End Date

Cancel

Save & New

Save

New Withdrawal: Regular

Withdrawal Details

* Amount

* Frequency

Indexation ⓘ

* Holding

Cancel

Save &

--None--

Monthly

BiMonthly

Quarterly

Half Yearly

Annually

Single

New Withdrawal: Regular

Withdrawal Details

* Amount

* Frequency

Indexation ⓘ

* Start Date

End Date

--None--

None

Average Weekly Earnings (AWE) 3.7%

Consumer Price Index (CPI) 5.5%

Retail Price Index (RPI) 7.8%

Other

Save & New

Save

New Withdrawal: Regular

Withdrawal Details

*** Amount**

*** Frequency**

Indexation ⓘ

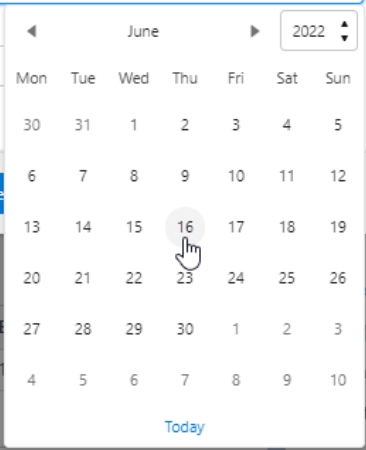
*** Start Date**

*** Holding**

End Date

Amount	Indexation	Indexation...	Start Date
£200.00	Retail Price Index (...)	11.10%	16/06/2022

[View All](#)



Once the fields are complete, **Save**

New Withdrawal: Regular

Withdrawal Details

*** Amount**

*** Frequency**

Indexation ⓘ

*** Start Date**

*** Holding**

End Date

The withdrawal can be found on the details screen of the holding:

Synaptic Pathways Home Contacts Research Portfolio Builder Investment Pathways Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Search...

Withdrawal "W-000002" was created.

Risk Rate Holding Review Edit Delete

Test Personal Pension

Details Underlying Assets Cash Accounts Assets Performance Charges History

Name: Test Personal Pension
Description: Generic Provider/Product Test Description

Provider Name: Test Provider
Type (Basis) Name: Personal Personal
Product Name: Test Personal Pension

Status: In force
Contract Reference: GJ67JK09

Start Date: 16/04/2014
End Date: 16/04/2032

Remaining Term: 10
Review Date: 16/06/2023

Rolling Term Basis
Last Modified Date: 16/06/2022, 08:46

Surrender/Transfer Value: 100,000.00

Contributions (1)
1 item • Updated 41 minutes ago

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 C-000007	Regular	Monthly	£200.00	Retail Price Index (...)	11.10%	16/06/2022	16/06/2027

[View All](#)

Withdrawals (1)
1 item • Updated a few seconds ago

Withdrawal Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 W-000002	Regular	Annually	£300.00	Retail Price Index...	11.10%	16/06/2022	10/06/2028

[View All](#)

Weighting By Funds
Chart not available

Performance Chart
We can't draw this chart because there is no data.

[View Report](#) As of Today at 08:46

Weighting By Class Allocation
Chart not available

If you would like to edit the withdrawal, select **Edit** under the drop down arrow:

Contributions (1)
1 item • Updated 41 minutes ago

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 C-000007	Regular	Monthly	£200.00	Retail Price Index (...)	11.10%	16/06/2022	16/06/2027

[View All](#)

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1 W-000002	Regular	Annually	£300.00	Retail Price Index...	11.10%	16/06/2022	10/06/2028

[View All](#)

Edit Delete

For further information on Holdings, see articles

[Generic Holdings - Underlying Assets](#)

[Risk Rate Holding](#)