

In-House Discretionary - Special Deals

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A Special Deal can be created under a Platform/Off-Platform product assigned to an In-House Discretionary Portfolio.

Navigate to the **Platforms & Products** tab in the In-House Discretionary Portfolio:

The screenshot shows the 'Platforms & Products' tab in the 'IHD Test Portfolio AP' interface. The interface is divided into three main sections:

- How it Works:** A text box explaining the search and selection process for platforms and products.
- Search Available Platforms:** A search bar with 'A' entered, showing a list of platforms with checkboxes. 'abrdn Wrap' and 'Elevate' are selected.
- Available On Platform Products:** A table of products under the 'abrdn Wrap' platform, with a 'Create Special Deal' button at the top right.

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"/>

Click/maximise the product you would like to create the Special Deal against:

The image shows two close-up screenshots of the interface:

- Search Available Platforms:** A search bar with 'A' entered, showing a list of platforms. 'abrdn Wrap' and 'Elevate' are selected.
- Available On Platform Products:** A table of products under the 'abrdn Wrap' platform, with a 'Create Special Deal' button at the top right. A mouse cursor is pointing at the 'AEGON Retirement Choices' product.

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"/>

Click on **Create Special Deal** at the top right of the product:

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"/>

> AEGON Retirement Choices

> Elevate

This will take you to the Special Deal:

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base abrdn Wrap | Special Deal X More

Q Search...

Name: **abrdn Wrap** Provider: **abrdn Wrap** Portfolio: **IHD Test Portfolio AP** Deal Start Date: (leave blank to apply from today) Last Modified Date: **Thu, 19 Oct 23**

Active Not Active Platform: **All Platform Products** Special Deal Type: **IHD** Deal End Date: (leave blank for no expiry date) Last Modified By: **Amy Paulsen**

Special Deal Charge Type Special Deal Charge Details About Special Deal

Platform Charges

Platform Charges

Charge Tier Name: **Platform AMC** View Provider Charges View Network Charges Revert to Provider Charges

Tier Start	Tier End	Rate %	Rate £	Fund Type
			0.00	All

Charge Tier Name: **GIA AMC** View Provider Charges View Network Charges Revert to Provider Charges

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£249,999.99	0.35		All
£250,000.00	£749,999.99	0.25		All
£750,000.00	£999,999.99	0.15		All
£1,000,000.00		0.10		All

Investment Bond

Edit the provider published charge tiers to apply the special deal you have agreed with the provider.

Change the existing tiers or add and remove new tiers.

Use the 'Revert' Action to return to the default published charge details.

From time to time published charges may be revised or removed by the provider, in the event of a change a warning notification will appear to indicate the special deal needs attention.

Special Deals are applied when an illustration is requested, only 'Active' Deals are applied.

The Portfolio name can be found within the summary box at the top of the screen:

Name: **abrdn Wrap** Provider: **abrdn Wrap** Portfolio: **IHD Test Portfolio AP** Deal Start Date: (leave blank to apply from today) Last Modified Date: **Thu, 19 Oct 23**

Active Not Active Platform: **All Platform Products** Special Deal Type: **IHD** Deal End Date: (leave blank for no expiry date) Last Modified By: **Amy Paulsen**

Complete the details of the Special Deal. For more information on how to complete the special deals area, see article [Creating Special Deals](#)