

In-House Discretionary - Amending a Special Deal

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This article is a continuation of [In-House Discretionary - Special Deals](#)

Once a Special Deal has been created against a product in an In-House Discretionary portfolio, you can amend the details if needed.

Navigate into the portfolio and click into the **Platforms & Products** tab:

Portfolio: IHD Test Portfolio AP

Duplicate Portfolio Import Funds Edit

Details Portfolio Builder Compliance Asset Allocation **Platforms & Products** Portfolio Factsheet Historic Performance

Platforms Off Platform Products Platforms & Products

How it Works

Using the search options available, add the Platforms and Products that the Portfolio can be purchased through. Once a platform has been added, the products on the platform which are supported can be included or excluded.

To remove an entire platform and all the underlying products, select the remove icon against the Platform in the availability list.

Off-Platform Products can be added and removed by first selecting the Off-Platform Product tab and using the search area provided.

The availability of the Portfolio will be considered when using the Portfolio in comparison research or during an Ex-ante proposal or Ex-post review.

Search Available Platforms

Search by Name

Search and Add Platforms to include in the In-House Discretionary Fund Management Portfolio.

Available On Platform Products

abrdn Wrap

View 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

Click/maximise the product you would like to amend:

Available On Platform Products

abrdn Wrap

View 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"/>

Hand cursor pointing to [AEGON Retirement Choices](#)

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Click the **View Special Deal** button:

The screenshot shows the 'Platforms' section of a system. It is divided into three main panels:

- How it Works:** Contains instructions on how to search for and manage platforms and products.
- Search Available Platforms:** Includes a search bar and a list of platforms to be added to the portfolio.
- Available On Platform Products:** A table listing products available for the 'abrdn Wrap' platform. At the top right of this panel, there are three buttons: 'View Special Deal' (highlighted with a mouse cursor), 'Delete Special Deal', and '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"/>

Make the changes on the deal and close once done:

The screenshot shows the 'Special Deal Charge Type' configuration page. It includes a header with deal details and a main section for configuring platform charges.

Deal Details:

- 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
- Platform: All Platform Products
- Special Deal Type: IHD
- Deal End Date: (leave blank for no expiry date)
- Last Modified By: Amy Paulsen

Platform Charges Configuration:

The 'Platform Charges' section is expanded to show 'Platform AMC' details. It includes a table for defining charge tiers.

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

Additional information on the right side of the page:

- About Special Deal:** 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.

For more information on setting up special deals, see article [Creating Special Deals](#)