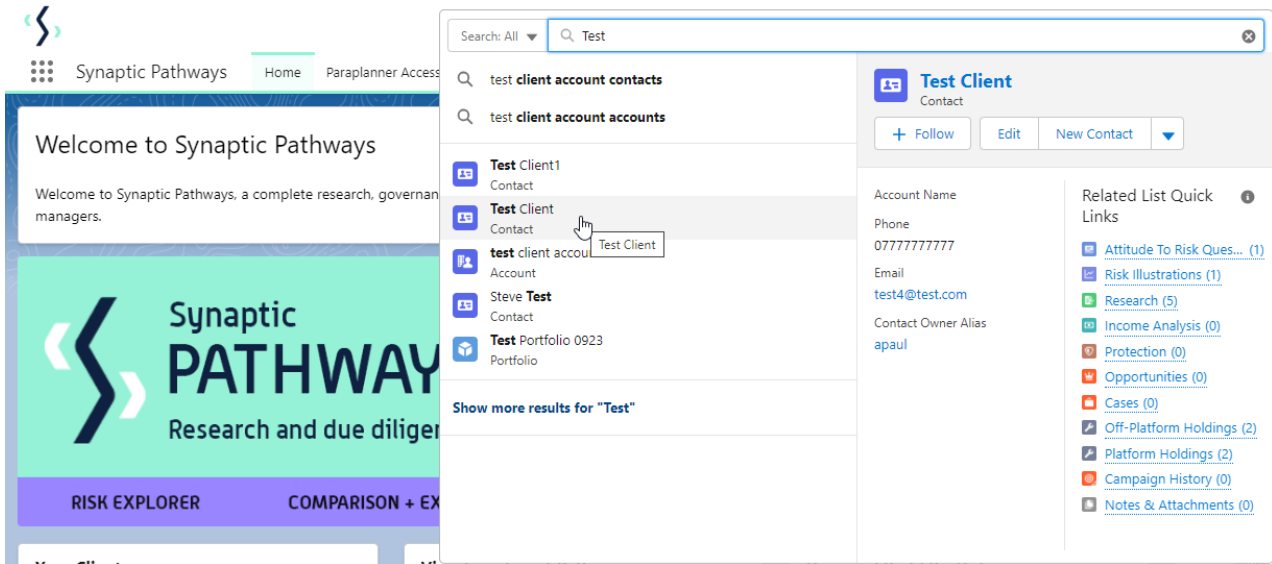


Creating a Platform Holding

Last Modified on 13/02/2024 3:35 pm GMT

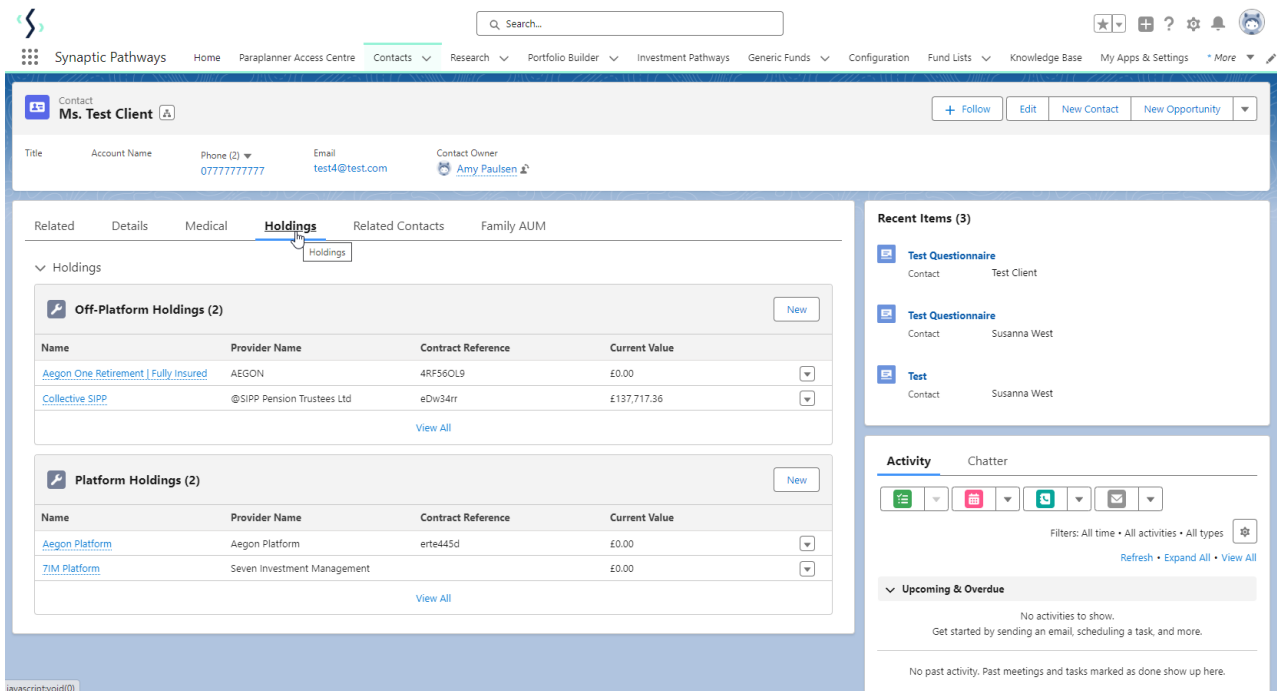
This article is a continuation of [Risk Rate Holding](#)

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 Platform Holdings area:



Contact **Ms. Test Client**

Title Account Name Phone (2) Email Contact Owner
 07777777777 test4@test.com Amy Paulsen

Related Details Medical **Holdings** Related Contacts Family AUM

Holdings

Off-Platform Holdings (2) New

Name	Provider Name	Contract Reference	Current Value
Aegon One Retirement Fully Insured	AEGON	4RF56OL9	£0.00
Collective SIPP	@SIPP Pension Trustees Ltd	eDw34rr	£137,717.36

[View All](#)

Platform Holdings (1) New

Name	Provider Name	Contract Reference	Current Value
Aegon Platform	Aegon Platform	erte445d	£0.00

[View All](#)

Enter the details of the holding.

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

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

New Platform

To create a platform holding, choose the holding type, select platform to create holdings held on a specific platform or select off platform products for everything else, if you can't find your product then enter the holding details manually.

* Provider

* Platform

* Platform Holding Name

Status

Contract Reference

Description

Start Date

Cancel Save & New Save

* Provider

Q Select a Provider

+ New Provider

- Quilter Internal
- Quilter Synaptic
- Raymond James Investment Services Ltd Synaptic
- Scottish Widows Platform Synaptic

* Platform

Q Search by Platform Name

Contract Reference

Enter Contract Reference

* Provider

Q Quilter

* Platform

Q Search by Platform Name

+ New Platform

- Quilter Synaptic

If you cannot find the provider, platform, or product, create a generic holding. See article [Creating a Generic Holding](#)

Complete further details of the holding:

New Platform

To create a platform holding, choose the holding type, select platform to create holdings held on a specific platform or select off platform products for everything else, if you can't find your product then enter the holding details manually.

* Provider

Q Quilter

* Platform

Q Quilter

* Platform Holding Name

Quilter

Status

Select an Option

- Notional
- Proposed
- In force
- Paid Up
- Transferred

Contract Reference

Enter Contract Reference

Description

Start Date

23 Mar 2022

Cancel Save & New Save

New Platform

To create a platform holding, choose the holding type, select platform to create holdings held on a specific platform or select off platform products for everything else, if you can't find your product then enter the holding details manually.

* Provider ✕ * Platform ✕

* Platform Holding Name Status ▼ Contract Reference

Description

Start Date 📅

Cancel
Save & New
Save

Save

🌟 + ? ⚙️ 🔔 👤

Synaptic Pathways
Home
Paraplanner Access Centre
Contacts
Research
Portfolio Builder
Investment Pathways
Generic Funds
Configuration
Fund Lists
Knowledge Base
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More

Holding Platform
Quilter

Request Valuation
Risk Rate Platform
Edit
Delete

Client
[Test Client](#)

Current Value
£0.00

Current Risk Rating

Details
Holdings
Cash Accounts
Assets
Performance
Charges
History

Name Quilter	Status In force
Provider Name Quilter	Start Date 21/09/2023
Platform Name Quilter	Contract Reference 345HU179
Description Test Platform Description	Last Modified By Amy Paulsen · 21/09/2023, 15:16
Valuation Type	

Performance Chart

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

[View Report](#)
As of Today at 15:16

For further information on Platform Holdings, see articles [Platform Holdings - Holdings](#)