

Generic Holdings - Charges

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

Charges information can be added to Generic Holdings through the **Charges** tab:

The screenshot shows the 'Charges' tab for a holding named 'Test Personal Pension | Fully Insured'. The interface includes a search bar at the top, a navigation menu with options like 'Details', 'Underlying Assets', 'Cash Accounts', 'Assets', 'Performance', 'Charges', and 'History'. The 'Charges' section contains several input fields: 'Headline Product Charge %' (0.00%), 'Product Growth Rates' (Low: -0.50%, Mid: 1.50%, High: 3.00%), and 'Adviser Fees' (Initial: 0.00%, One off Fee for Advice: £0.00, Regular Annual Fee: 0.00%). There are 'Cancel' and 'Save' buttons at the bottom. On the right, there are two charts: 'Weighting By Funds' showing a donut chart for '100.00% - Vanguard LifeStrategy 60% Equity A Shares Acc' and 'Performance Chart' showing a line graph for '25/09/2023'. Below the performance chart is a 'Weighting By Class Allocation' chart.

Enter the **Headline Product Charges %**

This close-up screenshot focuses on the 'Charges' tab. The 'Headline Product Charge %' field is highlighted with a blue border and contains the value '0.4'. The 'Product Growth Rates' section shows 'Override Defaults' as 'Inactive'. The 'Adviser Fees' section shows 'Initial Fee' as 0.00%, 'One off Fee for Advice' as £0.00, and 'Regular Annual Fee' as 0.00%. 'Cancel' and 'Save' buttons are visible at the bottom.

The **Override Defaults** button will be greyed out if there are no organisational default growth rates set. More information can be found in the article [Organisation Growth Rates](#)

If organisation growth rates have been set, you can override these values if needed.

Product Charge

Headline Product Charge %

Product Growth Rates

Growth rate percentages must be unique in each input field.

Override Defaults Inactive

Low Growth Rate % Mid Growth Rate % High Growth Rate %

Adviser Fees

Initial Fee One off Fee for Advice Regular Annual Fee

Enter the **Adviser Fees** and **Save**

Product Charge

Headline Product Charge %

Product Growth Rates

Growth rate percentages must be unique in each input field.

Override Defaults Inactive

Low Growth Rate % Mid Growth Rate % High Growth Rate %

Adviser Fees

Initial Fee One off Fee for Advice Regular Annual Fee

 **Success**
Holding information saved 

The charges tab will only be available on Generic Holdings.