In-House Discretionary -Platforms & Products

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This article is a continuation of In-House Discretionary - Asset Allocation

In an In-House Discretionary Portfolio, you are able to add Platforms and Products that the product can be purchased through.

| Synaptic Pathways Home Contacts V Research V | Q. Search Portfolio Builder Investment Pathways Configuration Fund Lists V Knowledge Base Mg | y Apps & Settings Valuations |
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| Portfolio IHD Test Portfolio | | Duplicate Portfolio Import Funds Edit 💌 |
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Use the Search box to find available platforms:

| Platforms Off Platform Products | | | | |
|--|--|----------|--------------------------------|--|
| How it Works | Search Available Platforms | | Available On Platform Products | |
| sing the search options available, add the Platforms and roducts that the Fortfolic can be purchased through. Once a statism has been added, the products on the platform which are opported can be included or excluded. romove an entire platform and all the underlying products, elect the remove icon against the Platform in the availability list. HP-Platform Products can added and removed by first selecting or GP-Platform Products than and using the service and neuroided. | A A A A A A A A A A A A A A | L3 | | |
| he wallability of the Portfolio will be considered when using the ortfolio in comparison research or during an Ex-ante proposal or x-post review. | Aegon Platform AEGON Retirement Choices ABGIN Retirement Choices Al Bell Investcentre Al Bell Investcentre (RIA) | | | |
| | + Ascentric - The Whole of Market Wrap + Aviva Wrap | . | | |

Click the + button to select the Platform:

| How it Works | Search Available Platforms | Available On Platform | n Products | | | | |
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| ing the search options available, add the Platforms and oducts that the Portfolio can be purchased through. Once a | Q A | ✓ abrdn Wrap | | | | | |
| form has been added, the products on the platform which are ported can be included or excluded. | abrdn Wrap | | | | | | |
| remove an entire platform and all the underlying products, | + Advance by Embark Platform | Product Name 🗸 | Provider Name V | Product Type 🛛 🗸 | Product Basis 🗸 🗸 | Included \lor | |
| ct the remove icon against the Platform in the availability list. | | abrdn Wrap - GIA | Standard Life Savings Lim | General Investment Acco | General Investment Acco | ~ | |
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| e Off-Platform Product tab and using the search area provided. | AEGON Retirement Choices | International Portfolio Bo | Standard Life International | Offshore Bonds | Unit Linked | Image: A set of the set of the | |
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| | Elevate | | | | | | |

Once added, products under the platforms can be excluded/included:

| abrdn Wrap | | | | |
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| Wrap SIPP | Standard Life Assurance | Self Invested Personal Pe | Full | ~ |
| Wrap SIPP | Standard Life Assurance | Income Drawdown | Income Drawdown | Image: A set of the set of the |

As Platforms are added, they will appear minimised. They can be maximised and minimised through the arrow on the left side:

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| Onshore Bond (Wrap) | Standard Life Assurance | Investment Bond | Unit Linked | ~ |
| Wrap SIPP | Standard Life Assurance | Self Invested Personal Pe | Full | ~ |
| Wrap SIPP | Standard Life Assurance | Income Drawdown | Income Drawdown | Image: A set of the set of the |

To remove a Platform and all the underlying assets, unselect the Platform:

| Search Available Platforms | ilable Platforms Available On Platform Products | | | | | | |
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| V Aviva Wrap | > AEGON Retirement (| Choices | | | | | |
| Elevate | > Aviva Wrap | | | | | | |
| ± | > Elevate | | | | | | |

Off-Platforms products can be added and removed through the Off-Platform tab:



The availability of the portfolio should be considered when performing platform/product comparisons or ex-ante research.

Once you have added the platforms & off-platform products to the portfolio, the costs & charges associated with the portfolio will be pulled through when conducting research.

A special deal can be added for each platform/product added. This will allow you to create a deal specific to the use of the In-House Discretionary Portfolio in Research.

For further information on Switch research, see article In-House Discretionary - Portfolio Factsheet