

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' interface. The interface is divided into three main sections:

- How it Works:** A text box explaining the search process and how to manage platforms and products.
- Search Available Platforms:** A search bar with 'A' entered, showing a list of platforms with checkboxes. The 'abrdn Wrap' platform is selected.
- Available On Platform Products:** A table listing products available on the selected platform.

Product Name	Provider Name	Product Type	Product Basis	Included
abrdn Wrap - GIA	Standard Life Savings Lim...	General Investment Acco...	General Investment Acco...	<input type="checkbox"/>
abrdn Wrap ISA	Standard Life Savings Lim...	Individual Savings Accou...	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 ...	Investment Bond	Unit Linked	<input checked="" type="checkbox"/>
Wrap SIPP	Standard Life Assurance ...	Self Invested Personal Pe...	Full	<input checked="" type="checkbox"/>
Wrap SIPP	Standard Life Assurance ...	Income Drawdown	Income Drawdown	<input checked="" type="checkbox"/>

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

This section shows the 'Search Available Platforms' interface. A search bar contains the letter 'A'. Below it, a list of platforms is displayed with checkboxes. The 'abrdn Wrap' platform is selected, and the 'AEGON Retirement Choices' platform is also selected. Other platforms like 'Aviva Wrap' and 'Elevate' are also visible.

This section shows the 'Available On Platform Products' interface. It displays a table of products available on the selected platform. The 'Aviva Wrap' product is highlighted, and a mouse cursor is pointing at the folder button (a right-pointing chevron) at the top right of the product name.

Product Name	Provider Name	Product Type	Product Basis	Included
abrdn Wrap - GIA	Standard Life Savings Lim...	General Investment Acco...	General Investment Acco...	<input type="checkbox"/>
abrdn Wrap ISA	Standard Life Savings Lim...	Individual Savings Accou...	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 ...	Investment Bond	Unit Linked	<input checked="" type="checkbox"/>
Wrap SIPP	Standard Life Assurance ...	Self Invested Personal Pe...	Full	<input checked="" type="checkbox"/>
Wrap SIPP	Standard Life Assurance ...	Income Drawdown	Income Drawdown	<input checked="" type="checkbox"/>

Click on the folder button at the top right of the product:

Search Available Platforms

Q A

- 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
- > AEGON Retirement Choices
- < Aviva Wrap

Product Name	Provider Name	Product Type	Product Basis	Included	Special Deal
Aviva Wrap - GIA	Aviva Wrap UK Ltd	General Investment Acco...	General Investment Acco...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aviva Wrap ISA Portfolio	Aviva Wrap UK Ltd	Individual Savings Accou...	ISA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aviva Wrap Pension Portf...	Aviva Wrap UK Ltd	Personal Pension (Fully In...	Personal Pension (Fully In...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aviva Wrap Pension Portf...	Aviva Wrap UK Ltd	Income Drawdown	Income Drawdown	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aviva Wrap Pension Portf...	Aviva Wrap UK Ltd	Self Invested Personal Pe...	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- > Elevate

This will take you to the Special Deal:

Special Deal Charge Type | **Special Deal Charge Details** | **About Special Deal**

Platform Charges

▼ Platform Charges

Charge Tier Name: **Platform Stockbroker Dealing Fees**

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£9,999,999.00		£7.50	All

Charge Tier Name: **GIA AMC**

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£400,000.00	0.25		All
£400,000.00		0.15		All

Charge Tier Name: **GIA Switch Stockbroker Dealing Fees**

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£9,999,999.00		£7.50	All

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.

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

Name Aviva Wrap	Provider Aviva Wrap	Portfolio IHD Test Portfolio	Deal Start Date (leave blank to apply from today)	Last Modified Date Fri, 19 Aug 22
<input checked="" type="checkbox"/> Active <input type="checkbox"/> 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](#)