

Off-Platform Holdings - Contributions

Last Modified on 21/09/2023 2:44 pm BST

This article is a continuation of [Off-Platform Holdings - Underlying Assets](#)

To add contributions to an Off-Platform Holding. Click **New** in the Contributions area:

The screenshot shows the Synaptic Pathways interface for a holding named 'Collective SIPP'. The top navigation bar includes a search box and various utility icons. The main content area is divided into several sections:

- Client Information:** Client: Test Client, Current Value: £137,717.36, Current Risk Rating: 4 | Moderately Cautious (High End).
- Details Tab:** A table with the following data:

Name	Description	Start Date	End Date
Collective SIPP	Pension Plan	04/07/2022	03/07/2033

Provider Name	Type (Basis) Name	Product Name	Remaining Term	Review Date
@SIPP Pension Trustees Ltd	Income Drawdown	Collective SIPP	10	

Status	Contract Reference	Valuation Type	Rolling Term Basis	Last Modified Date
In force	eDw34rr			21/09/2023. 13:45
- Weighting By Funds:** A donut chart showing 100.00% - Vanguard LifeStrategy 40% Equity A Shares Acc.
- Performance Chart:** A line chart showing the sum of value over time.
- Contributions (0):** A section with a 'New' button.
- Withdrawals (0):** A section with a 'New' button.

Select either Regular, Single or Transfer:

The 'New Contribution' dialog box is displayed, showing the following options:

Select a record type

- Initial
- Regular
- Single
- Transfer

Buttons: Cancel, Next

Complete the details of the Contribution:

New Contribution: Regular

Contribution Details

<p>* Frequency</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> --None-- ▼ </div>	<p>* Amount</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>Indexation ⓘ</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> --None-- ▼ </div>	<p>* Start Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div>
<p>* Holding</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Aegon One Retirement Fully Insured ✕ </div>	<p>End Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div>

Cancel
Save & New
Save

Contribution Details

<p>* Frequency</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> --None-- ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>✓ --None--</p> <p>Monthly</p> <p>Annually</p> <p>Single</p> </div>	<p>* Amount</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> <p>* Start Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div> <p>End Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div>
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New Contribution: Regular

Contribution Details

<p>* Frequency</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center; background-color: #ffff00;"> Monthly ↶ </div>	<p>* Amount</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center; background-color: #ffff00;"> £200.00 ↶ </div>
<p>Indexation ⓘ</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> --None-- ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>✓ --None--</p> <p>None</p> <p>Average Weekly Earnings (AWE) 7.8%</p> <p>Consumer Price Index (CPI) 6.8%</p> <p>Retail Price Index (RPI) 9%</p> <p>Other</p> </div>	<p>* Start Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div> <p>End Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div>

Save & New
Save

Performance Ch

Performance Ch

140k

New Contribution: Regular

Contribution Details

*** Frequency** ↶

Monthly ▼

*** Amount** ↶

£200.00

Indexation ⓘ ↶

Retail Price Index (RPI) 9% ▼

*** Start Date**

*** Holding**

Collective SIPP ✕

End Date

A calendar pop-up is displayed over the Start Date field, showing the month of June 2023. The date 6 is highlighted with a mouse cursor. The calendar includes days of the week (Mon-Sun) and dates from 1 to 31. A 'Today' label is at the bottom.

Once all fields are complete, **Save**

New Contribution: Regular

Contribution Details

*** Frequency** ↶

Monthly ▼

*** Amount** ↶

£200.00

Indexation ⓘ ↶

Retail Price Index (RPI) 9% ▼

*** Start Date** ↶

13/06/2018

*** Holding**

Collective SIPP ✕

End Date ↶

16/06/2033

A close-up of the 'Save' button at the bottom right of the form, showing a mouse cursor hovering over it.

The Contribution can be found on the details screen of the holding:

Holding **Collective SIPP** Risk Rate Holding Review Edit Delete

Details Underlying Assets Cash Accounts Assets Performance Charges History

Name Collective SIPP	Description Pension Plan	Start Date 04/07/2022	End Date 03/07/2033
Provider Name @SIPP Pension Trustees Ltd	Type (Basis) Name Income Drawdown	Product Name Collective SIPP	Remaining Term 10
Status In force	Contract Reference eDw34rr	Valuation Type	Rolling Term Basis
			Last Modified Date 21/09/2023, 13:45
			Surrender/Transfer Value

Weighting By Funds

100.00% - Vanguard LifeStrategy 40% Equity A Shares Acc

Performance Chart

Sum of Value

21/09/2023 Date

View Report As of Today at 14:39

Reports View **Tabular View**

Contributions (1) 1 item • Updated a few seconds ago

Contribution...	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date
1 C-000165	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	13/06/2018

View All

Withdrawals (0) New

If you would like to edit the details, click **Edit** under the drop down arrow:

Contributions (1) 1 item • Updated 3 minutes ago

Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	13/06/2018	16/06/2033

View All

Edit Delete Edit

For further information on Off-Platform Holdings, see article [Off-Platform Holdings - Withdrawals](#)