## Creating a Platform Holding

This article is a continuation of Risk Rate Holding

Create a New Contact or load an existing record:

<b>'</b>	Search: All 🔻 🔍 Test	0
Synaptic Pathways Home Paraplanner Access	Q test client account contacts	E Test Client
Welcome to Synaptic Pathways	Q test client account accounts	Contact + Follow Edit New Contact
Welcome to Synaptic Pathways, a complete research, governan managers. Synaptic PATHWAY	Test Client1 Contact     Image: Client Client Client       Test Client Contact     Image: Client Client Client       Account     Account       Steve Test Client Contact     Contact       Test Portfolio 0923 Portfolio     Portfolio	Account Name Related List Quick  Phone Links 07777777777 C Attitude To Risk Ques (1) Email C Risk Illustrations (1) test4@test.com Research (5) Contact Owner Alias Income Analysis (0) apaul Protection (0)
Research and due diliger	Show more results for "Test"	<ul> <li>Opportunities (0)</li> <li>Cases (0)</li> <li>Off-Platform Holdings (2)</li> <li>Platform Holdings (2)</li> </ul>
RISK EXPLORER COMPARISON + EX		Campaign History (0) Notes & Attachments (0)
Vous Cliente		A Divid Devitation Prope

This will open the contact record.

Click into the **Holdings** tab and click **New** under the Platform Holdings area:

\$		Q Search			** 🖬 ? 🌣 🐥 🐻
Synaptic Pathways Home	Paraplanner Access Centre Contact	s 🗸 Research 🗸 Portfolio Builder	<ul> <li>Investment Pathways</li> </ul>	Generic Funds 🗸 Con	nfiguration Fund Lists 🗸 Knowledge Base My Apps & Settings * More 🔻 🖋
Contact Ms. Test Client 👗					+ Follow Edit New Contact New Opportunity
	ne (2) ♥ Email 77777777 test4@test.com	Contact Owner			
Related Details Medic	al <u>Holdings</u> Related Co	ontacts Family AUM			Recent Items (3)
✓ Holdings	Holdings				Test Questionnaire Contact Test Client
Off-Platform Holdings (2	)			New	Test Questionnaire
Name	Provider Name	Contract Reference	Current Value		Contact Susainia WEst
Aegon One Retirement   Fully Insured	AEGON	4RF56OL9	£0.00	v	E Test
Collective SIPP	@SIPP Pension Trustees Ltd	eDw34rr	£137,717.36		Contact Susanna West
		View All			
					Activity Chatter
Platform Holdings (2)				New	
Name	Provider Name	Contract Reference	Current Value		Filters: All time • All activities • All types
Aegon Platform	Aegon Platform	erte445d	£0.00	<b>v</b>	Refresh • Expand All • View All
7IM Platform	Seven Investment Management		£0.00	•	✓ Upcoming & Overdue
		View All			No activities to show. Get started by sending an email, scheduling a task, and more.
avascript:void(0)					No past activity. Past meetings and tasks marked as done show up here.

e Account Name	Phone (2) V Email	Contact Owner		
	07777777777777777777777777777777777777	m 🛛 👸 Amy Paulsen 🏝		
Related Details	Medical <b>Holdings</b> Rela	ted Contacts Family AUM		
✓ Holdings				
Off-Platform Ho	oldings (2)			New
Name	Provider Name	Contract Reference	Current Value	
Name Aegon One Retirement   Full		Contract Reference 4RF56OL9	Current Value	V
				•
Aegon One Retirement   Full	y Insured AEGON	4RF56OL9	£0.00	
Aegon One Retirement   Full	y Insured AEGON ©SIPP Pension Trustees Ltd	4RF56OL9 eDw34rr	£0.00	New
Aegon One Retirement   Full Collective SIPP	y Insured AEGON ©SIPP Pension Trustees Ltd	4RF56OL9 eDw34rr	£0.00	

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:

create a platform holding, choose the h oduct then enter the holding details mar	olding type, select platform to ually.				
* Provider		* Platfor	m		
Q Select a Provider			arch by Platform Name		
* Platform Holding Name	Status Sele	ct an Option		ict Reference er Contract Reference	
Description					
Start Date					
23 Mar 2022	<b></b>				

* Provider	* Platform
Q Select a Provider	Q Search by Platform Name
+ New Provider	
Quilter Internal	A
Synaptic Im	Contract Reference
Baymond James Investment Services Ltd Synaptic	Enter Contract Reference
Scottish Widows Platform Synaptic	•

* Provider	* Platform
Q. Quilter X	Q Search by Platform Name
	+ New Platform
	Synaptic

If you cannot find the provider, platform, or product, create a generic holding. See articleCreating a Generic Holding

Complete further details of the holding:

create a platform holding, choose the holdir	g type, select pla	tform to create holdings held o	n a specific platform or sele	ect off platform products for everything else, if you	ı can't find your
oduct then enter the holding details manual	/.				
* Provider Q Quilter		×	* Platform Q. Quilter		×
of conter		~	Q Quiter		~
* Platform Holding Name		Status		Contract Reference	
Quilter		Select an Option		Enter Contract Reference	
Description		Netheral			
		Notional			
		Proposed			//
		In force			
		Paid Up			
Start Date		Transferred			
23 Mar 2022	<b></b>				

	New Pla	atform	
create a platform holding, choose the holding type, select p oduct then enter the holding details manually.			
* Provider		* Platform	
Q Quilter	×	Q Quilter	×
* Platform Holding Name	Status		Contract Reference
Quilter	In force	•	345HUI79
Description Test Platform Description			
Start Date			
21 Sept 2023			
	Cancel Save 8	k New Save	

## Save

Synaptic Pathways Home Paraplanner Access Centre Contacts >  Holding Platform Quilter	Q Search Research v Portfolio Builder v Investment Pathways Generic Funds v Con	tfiguration Fund Lists ∨ Knowledge Base My Apps & Settings *More ▼ ✓ Request Valuation Risk Rate Platform Edit Delete
Client Current Value Current Risk Rating Test Client £0.00		
Details         Holdings         Cash Accounts         Assets         Performa           Name         Quilter         Provider Name         Quilter         Platform Name         Quilter         Platform Description         Pastform Description         Platform Description         Valuation Type         Valuation Type <td< td=""><td>nce Charges History Status In force Start Date 21/09/2023 Contract Reference 34SHUI79 Last Modified By Xmy Paulsen, 21/09/2023, 15:16</td><td>Performance Chart We can't draw this chart because there is no data.</td></td<>	nce Charges History Status In force Start Date 21/09/2023 Contract Reference 34SHUI79 Last Modified By Xmy Paulsen, 21/09/2023, 15:16	Performance Chart We can't draw this chart because there is no data.
valuation type		View Report As of Today at 15:16 C <sup>4</sup>

For further information on Platform Holdings, see articles Platform Holdings - Holdings