Platform Holdings - Holdings

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This article is a continuation of Creating a Platform Holding.

Once created, add holdings within the **Holdings** tab:

Click **New**

Complete the details of the holding:

Add Holdings

When creating a holding you can either select from the list of published products or add your own product. Published provider products that are open to new business and have published type eg; GIA, ISA will appear at the top of the search list(s), any basis types below the line will require you to provide a name for the product yourself.

* Provider
Search Providers

New Provider

Quilter
Synaptic

* Type Basis
Search Type Basis

* Product
Search Products

* Holding Name

Status
Select an Option

Contract Reference

Description

* Enter Remaining Term (In Years)

☐ Rolling Term

* Start Date

End Date

Cancel   Save & New   Save

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* Provider
Quilter   ✕

* Type Basis
Search Type Basis

New Type Basis

Individual Savings Accounts (ISA)
Synaptic

Investment Bond (Unit Linked)
Synaptic

Personal Pension (Fully Insured)
Synaptic

Self Invested Personal Pension (Full)
Synaptic

* Product
Search Products

* Holding Name

Contract Reference

Description

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* Provider
Quilter   ✕

* Type Basis
Personal Pension (Fully Insured)   ✕

* Product
Search Products

New Product

Collective Retirement Account
Synaptic

* Holding Name

Status
Select an Option

Contract Reference

Description

* Provider	* Type Basis	* Product
🔍 Quilter ✕	🔍 Personal Pension (Fully Insured) ✕	🔍 Collective Retirement Account ✕

*Holding Name
Collective Retirement Account | Fully Insured

Status
Select an Option ▼

Notional
Proposed
In force
Paid Up
Transferred
Cancelled

Contract Reference

Description

*Enter Remaining Term (In Years) ⓘ

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*Holding Name
Collective Retirement Account | Fully Insured

Status
In force ▼

Contract Reference
8JBN90L

Description
Test Personal Pension Description

When complete, **Save**

Add Holdings

type eg; GIA, ISA will appear at the top of the search list(s), any basis types below the line will require you to provide a name for the product yourself.

* Provider	* Type Basis	* Product
🔍 Quilter ✕	🔍 Personal Pension (Fully Insured) ✕	🔍 Collective Retirement Account ✕

*Holding Name
Collective Retirement Account | Fully Insured

Status
In force ▼

Contract Reference

Description
Test Personal Pension Description

*Enter Remaining Term (In Years) ⓘ
10

☐ Rolling Term

*Start Date
22 Sept 2022 📅

End Date
21 Sept 2033 📅

Review Date
22 Aug 2024 📅

Surrender/Transfer Value
148,523

Cancel   Save & New   **Save**

This will take you to the holding:

For further information on Platform Holdings, see article Platform Holdings - Underlying Assets