

Platform Holdings - Contributions

Last Modified on 21/09/2023 3:45 pm BST

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

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

The screenshot displays the Synaptic Pathways interface for a 'Collective Retirement Account | Fully Insured'. The interface includes a navigation menu with options like Synaptic Pathways, Home, Paraplanner Access Centre, Contacts, Research, Portfolio Builder, Investment Pathways, Generic Funds, Configuration, Fund Lists, Knowledge Base, and More. A search bar is located at the top. The main content area has tabs for Details, Underlying Assets, Performance, Charges, and History. The Details tab is active, showing fields for Name, Description, Start Date, End Date, Remaining Term, Review Date, Rolling Term Basis, Last Modified Date, and Surrender/Transfer Value. A 'Weighting By Funds' donut chart shows 100.00% Vanguard LifeStrategy 60% Equity A Shares Acc. A 'Performance Chart' is also visible. At the bottom, there are sections for 'Contributions (0)' and 'Withdrawals (0)', each with a 'New' button.

Select either Regular, Single or Transfer:

The screenshot shows the 'New Contribution' dialog box. The dialog has a title bar with a close button (X). The main content area is titled 'New Contribution' and contains a section 'Select a record type' with four radio button options: Initial, Regular (selected), Single, and Transfer. At the bottom right, there are 'Cancel' and 'Next' buttons.

Complete the details of the Contribution:

New Contribution: Regular

Contribution Details

* Frequency: --None--

* Amount:

Indexation ⓘ: --None--

* Start Date:

* Holding: Collective Retirement Account | Fully Insured

End Date:

Contribution Details

* Frequency: --None--

- ✓ --None--
- Monthly
- Annually
- Single

* Amount:

* Start Date:

End Date:

New Contribution: Regular

Contribution Details

* Frequency: Monthly

* Amount: £200.00

Indexation ⓘ: --None--

- ✓ --None--
- None
- Average Weekly Earnings (AWE) 7.8%
- Consumer Price Index (CPI) 6.8%
- Retail Price Index (RPI) 9%
- Other

Performance Ch 1.4k

New Contribution: Regular

Contribution Details

*** Frequency** ↶

Monthly ▼

*** Amount** ↶

£200.00

Indexation ⓘ ↶

Retail Price Index (RPI) 7.8% ▼

*** Start Date** ↶

*** Holding**

Collective Retirement Account | Fully Insured ✕

End Date ↶

March 2022

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Today

Once all fields are complete, **Save**

New Contribution: Regular

Contribution Details

*** Frequency** ↶

Monthly ▼

*** Amount** ↶

£200.00

Indexation ⓘ ↶

Retail Price Index (RPI) 9% ▼

*** Start Date** ↶

28/03/2023

*** Holding**

Collective Retirement Account | Fully Insured ✕

End Date ↶

01/03/2024

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

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base More

Search...

Collective Retirement Account | Fully Insured Contribution C-000166 was created. Risk Rate Holding Review Edit Delete

Client: Test Client Holding Platform: Quilter Current Value: £1,313.69 Current Risk Rating

Details Underlying Assets Performance Charges History

Name: Collective Retirement Account | Fully Insured Description: Test Personal Pension Description

Provider Name: Quilter Type (Basis) Name: Personal Pension (Fully Insured) Product Name: Collective Retirement Account

Status: In force Contract Reference Valuation Type

Start Date: 22/09/2022 End Date: 21/09/2033

Remaining Term: 10 Review Date: 22/08/2024

Rolling Term Basis Last Modified Date: 21/09/2023, 15:29

Surrender/Transfer Value: 148,523.00

Weighting By Funds: 100.00% - Vanguard LifeStrategy 60% Equity A Shares Acc

Performance Chart

Reports View Tabular View

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

Contribution...	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
Waiting for synapticpathways-999166@testing-force.co.uk	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	28/03/2023	01/03/2024

If you would like to edit the details, select 'Edit' under the drop down arrow:

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

Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	28/03/2023	01/03/2024

View All

Edit Delete Edit

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