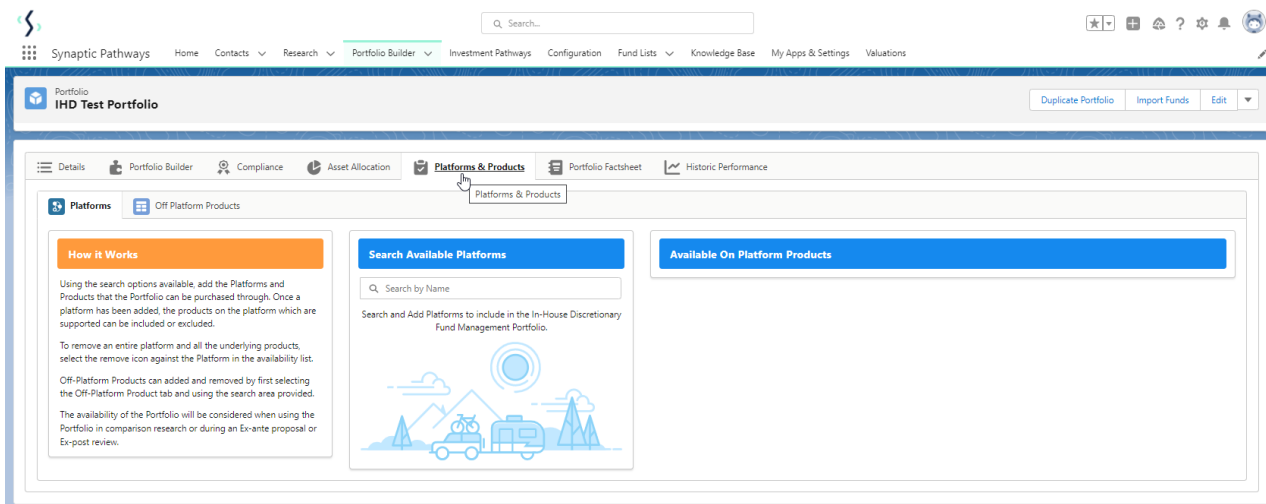


In-House Discretionary - Platforms & Products

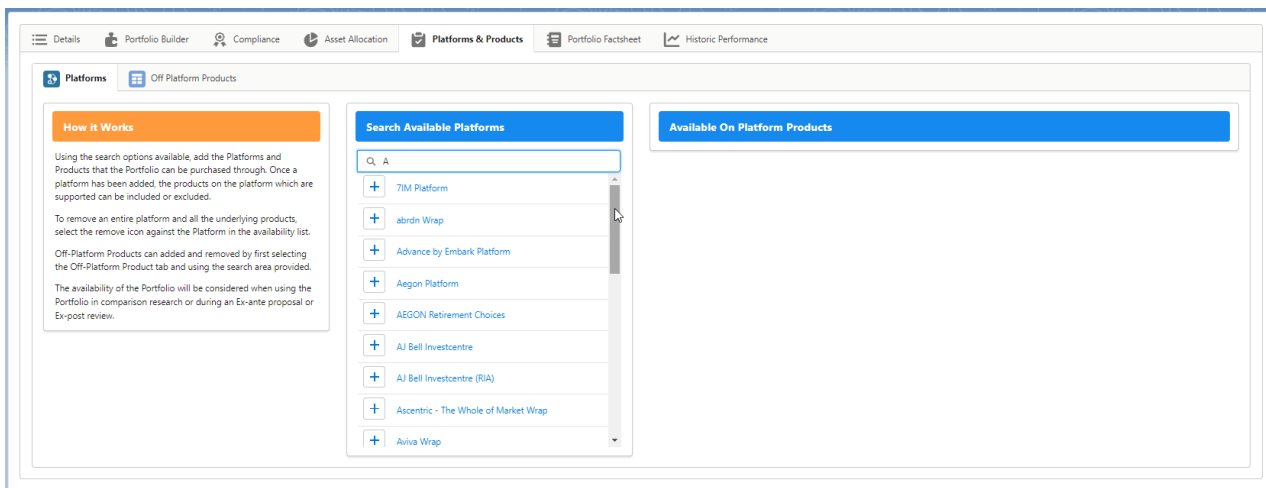
Last Modified on 23/04/2024 11:44 am BST

This article is a continuation of [In-House Discretionary - Asset Allocation](#)

In an In-House Discretionary Portfolio, you are able to add Platforms and Products that the product can be purchased through.



Use the Search box to find available platforms:



Click the + button to select the Platform:

Platforms **Off Platform Products**

How it Works

Using the search options available, add the Platforms and Products that the Portfolio can be purchased through. Once a platform has been added, the products on the platform which are supported can be included or excluded.

To remove an entire platform and all the underlying products, select the remove icon against the Platform in the availability list.

Off-Platform Products can added and removed by first selecting the Off-Platform Product tab and using the search area provided.

The availability of the Portfolio will be considered when using the Portfolio in comparison research or during an Ex-ante proposal or Ex-post review.

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

Product Name	Provider Name	Product Type	Product Basis	Included
abrdn Wrap - GIA	Standard Life Savings Lim...	General Investment Acco...	General Investment Acco...	<input checked="" 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"/>

> AEGON Retirement Choices

Once added, products under the platforms can be excluded/included:

Available On Platform Products

▼ abrdn Wrap

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"/>

> AEGON Retirement Choices

As Platforms are added, they will appear minimised. They can be maximised and minimised through the arrow on the left side:

Available On Platform Products

▼ abrdn Wrap

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"/>

▶ AEGON Retirement Choices

To remove a Platform and all the underlying assets, unselect the Platform:

Search Available Platforms

- 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

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"/>

[> AEGON Retirement Choices](#)
[> Aviva Wrap](#)
[> Elevate](#)

Off-Platforms products can be added and removed through the Off-Platform tab:

Portfolio **IHD Test Portfolio**

[Duplicate Portfolio](#)
[Import Funds](#)
[Edit](#)

Details
Portfolio Builder
Compliance
Asset Allocation
Platforms & Products
Portfolio Factsheet
Historic Performance

How it Works

Using the search options available, add the Platforms and Products that the In House Discretionary Portfolio can be purchased through and the portfolio costs & charges associated with doing so.


A platform or product can be removed from the list if no longer available using the remove icon.

The availability of the Portfolio will be considered when performing platform/product comparisons or Ex-ante research.


Search Available Off Platform Products

All

Search and Add Off Platform Products to include in the In-House Discretionary Fund Management Portfolio.



Available Off Platform Products



No Off Platforms Available

Search and select available Off Platforms for this DFM

The availability of the portfolio should be considered when performing platform/product comparisons or ex-ante research.

Once you have added the platforms & off-platform products to the portfolio, the costs & charges associated with the portfolio will be pulled through when conducting research.

A special deal can be added for each platform/product added. This will allow you to create a deal specific to the use of the In-House Discretionary Portfolio in Research.

For further information on Switch research, see article [In-House Discretionary - Portfolio Factsheet](#)