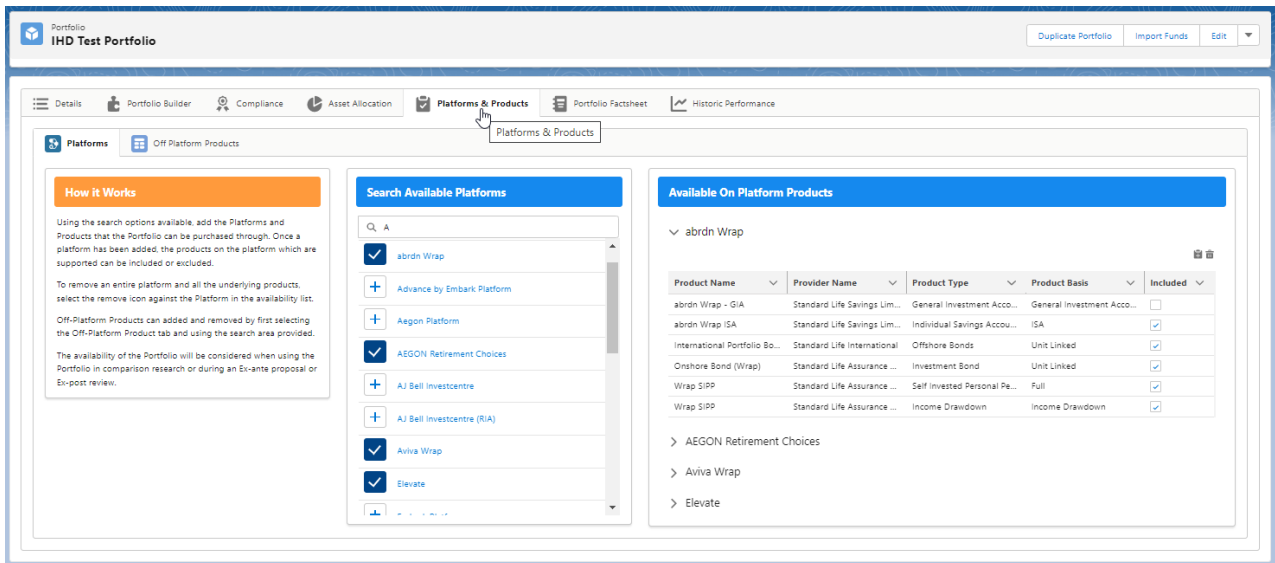


In-House Discretionary - Special Deals

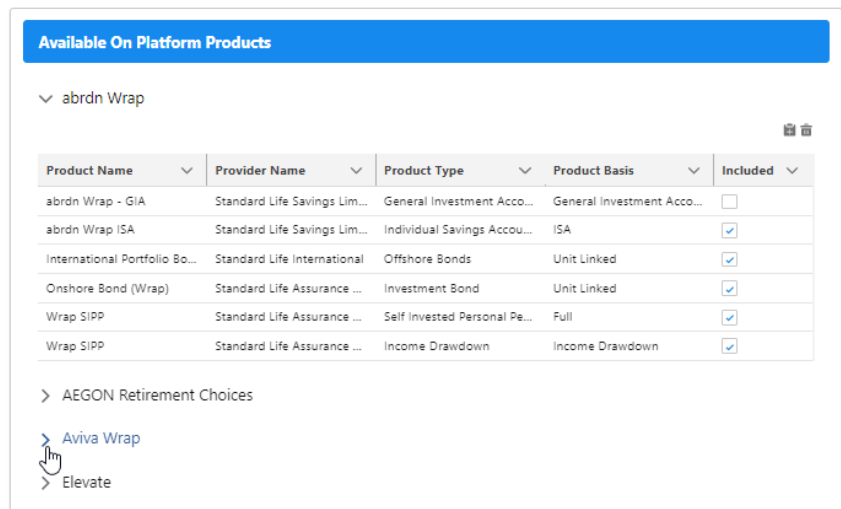
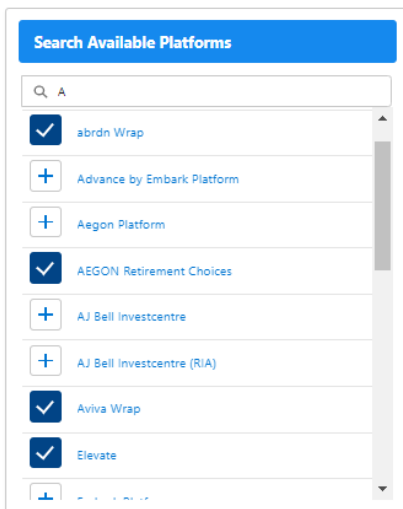
Last Modified on 23/04/2024 11:44 am BST

A Special Deal can be created under a Platform/Off-Platform product assigned to an In-House Discretionary Portfolio.

Navigate to the **Platforms & Products** tab in the In-House Discretionary Portfolio:



Click/maximise the product you would like to create the Special Deal against:



Click on the folder button at the top right of the product:

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
- > AEGON Retirement Choices
- < Aviva Wrap

Product Name	Provider Name	Product Type	Product Basis	Included	Special Deal
Aviva Wrap - GIA	Aviva Wrap UK Ltd	General Investment Acco...	General Investment Acco...	<input checked="" type="checkbox"/>	
Aviva Wrap ISA Portfolio	Aviva Wrap UK Ltd	Individual Savings Accou...	ISA	<input checked="" type="checkbox"/>	
Aviva Wrap Pension Portf...	Aviva Wrap UK Ltd	Personal Pension (Fully In...	Personal Pension (Fully In...	<input checked="" type="checkbox"/>	
Aviva Wrap Pension Portf...	Aviva Wrap UK Ltd	Income Drawdown	Income Drawdown	<input checked="" type="checkbox"/>	
Aviva Wrap Pension Portf...	Aviva Wrap UK Ltd	Self Invested Personal Pe...	Full	<input checked="" type="checkbox"/>	

- > Elevate

This will take you to the Special Deal:

Special Deal Charge Type | **Special Deal Charge Details** | **About Special Deal**

Platform Charges

Platform Charges

Charge Tier Name	Tier Start	Tier End	Rate %	Rate £	Fund Type
Platform Stockbroker Dealing Fees	£0.00	£9,999,999.00		£7.50	All
GIA AMC	£0.00	£400,000.00	0.25		All
	£400,000.00		0.15		All
GIA Switch Stockbroker Dealing Fees	£0.00	£9,999,999.00		£7.50	All

About Special Deal

Edit the provider published charge tiers to apply the special deal you have agreed with the provider.

Change the existing tiers or add and remove new tiers.

Use the 'Revert' Action to return to the default published charge details.

From time to time published charges may be revised or removed by the provider, in the event of a change a warning notification will appear to indicate the special deal needs attention.

Special Deals are applied when an illustration is requested, only 'Active' Deals are applied.

The Portfolio name can be found within the summary box at the top of the screen:

Name Aviva Wrap	Provider Aviva Wrap	Portfolio IHD Test Portfolio	Deal Start Date (leave blank to apply from today)	Last Modified Date Fri, 19 Aug 22
<input checked="" type="checkbox"/> Active <input type="checkbox"/> Not Active	Platform All Platform Products	Special Deal Type IHD	Deal End Date (leave blank for no expiry date)	Last Modified By Amy Paulsen

Complete the details of the Special Deal. For more information on how to complete the special deals area, see article [Creating Special Deals](#)