

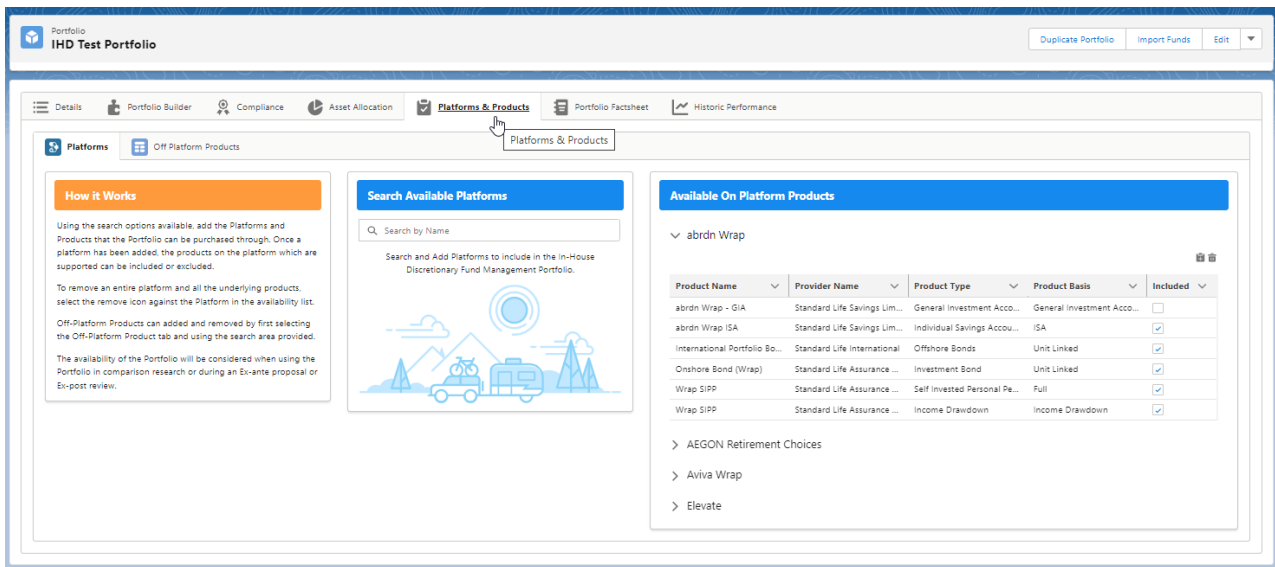
In-House Discretionary - Amending a Special Deal

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

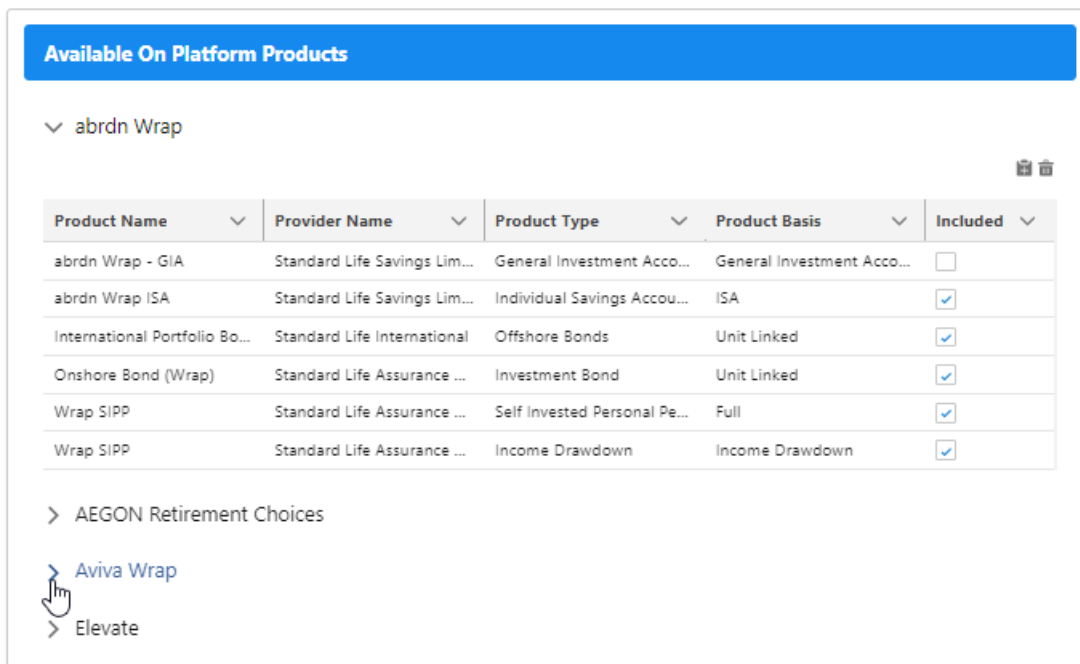
This article is a continuation of [In-House Discretionary - Special Deals](#)

Once a Special Deal has been created against a product in an In-House Discretionary portfolio, you can amend the details if needed.

Navigate into the portfolio and click into the **Platforms & Products** tab:



Click/maximise the product you would like to amend:



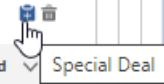
Click into the Special Deals folder button:

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



Make the changes on the deal and close once done:

Name
Aviva Wrap

Provider
Aviva Wrap

Platform
All Platform Products

Portfolio
IHD Test Portfolio

Special Deal Type
IHD

Deal Start Date (leave blank to apply from today)
19 Aug 2022

Deal End Date (leave blank for no expiry date)
20 Aug 2022

Last Modified Date
Fri, 19 Aug 22

Last Modified By
Amy Paulsen

Special Deal Charge Type

Special Deal Charge Details

About Special Deal

Platform Charges

▼ Platform Charges

Charge Tier Name
Platform Stockbroker Dealing Fees

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£9 999 999.00		£7.50	All

Charge Tier Name
GIA AMC

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£400,000.00	0.25		All
£400,000.00		0.15		All

Charge Tier Name
GIA Switch Stockbroker Dealing Fees

Tier Start	Tier End	Rate %	Rate £	Fund Type
£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.

▼ Aviva Wrap ISA Portfolio