

Creating a special deal for Abrdn

Last Modified on 14/06/2024 12:01 pm BST

In Synaptic Pathways, you are able to create special deals for Providers. Provider charging structures can vary and may need to be setup differently to ensure the deal pulls through correctly.

For the Abrdn Platform, Synaptic Pathways has charging set up at individual wrapper level to include the additional charges for the International Portfolio Bond and Onshore Bond.

For example, In Synaptic Pathways the standard charge for GIA looks like this:

Note: Screenshots in our articles are for demonstration purposes only.

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£250,000.00	0.30		All
£250,000.00	£500,000.00	0.20		All
£500,000.00		0.10		All

The International Portfolio Bond has the additional 0.12% applied and the Onshore bond has the additional 0.15% applied to give the below standard bond charge in Pathways.

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£250,000.00	0.45		All
£250,000.00	£500,000.00	0.35		All
£500,000.00		0.25		All

Setting up a Special Deal

There are multiple ways of setting up terms for Abrdn. Here's two examples:

- If the deal is the same over all wrappers, set the special deal at Platform AMC level and remove individual wrapper AMC charges. This will apply the deal to all wrappers on the platform.
- If the deal is per individual wrapper, leave the Platform AMC at zero and amend charges under each wrapper.

We'll break down each example below.

Example 1

Platform AMC deal.

As we are setting our deal at Platform AMC level, we will start by removing the AMC on individual wrappers. This includes **GIA, Onshore Bond, Offshore Bond, ISA, SIPP & Income**

Drawdown AMC

This will ensure charges are not duplicated in the calculations.

Click **Edit**

Charge Tier Name
GIA AMC

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£249,999.99	0.35		All
£250,000.00	£749,999.99	0.25		All
£750,000.00	£999,999.99	0.15		All
£1,000,000.00		0.10		All

Click on the pen icon next to the **Rate %**

Charge Tier Name
GIA AMC

Tier S...	Tier E...	Rate %	Rate £	Curre...	Select Fu...	Remove
1	£0.00	£249,...	0.35	All	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
2	£250,...	£749,...	0.25	All	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
3	£750,...	£999,...	0.15	All	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
4	£1,00...		0.10	All	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

Add a zero next to each rate and **Save** once done:

Tier ...	Tier ...	Rate %	Rate £	Curr...	Select Fu...	Remove
1	£0.00	£249,...	<input type="text" value="0"/>		<input type="button" value="Remove"/>	<input type="button" value="Remove"/>
2	£250,...	£749,...	0.25	All	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
3	£750,...	£999,...	0.15	All	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
4	£1,00...		0.10	All	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

Charge Tier Name
GIA AMC

View Provider Charges View Network Charges

Revert to Provider Charges

	Tier S...	Tier E...	Rate %	Rate £	Curre...	Select Fu...	Remove
1	£0.00	£249,...	0.00		All		
2	£250,...	£749,...	0.00		All		
3	£750,...	£999,...	0.00		All		
4	£1,00,...		0.00		All		

Cancel Save

Charge Tier Name
GIA AMC

View Provider Charges View Network Charges

Revert to Provider Charges

	Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£249,999.99	0.00		All
2	£250,000.00	£749,999.99	0.00		All
3	£750,000.00	£999,999.99	0.00		All
4	£1,000,000.00		0.00		All

Edit Add Row

Repeat this for the remaining wrappers.

To setup the Platform AMC deal, click **Edit**

Charge Tier Name
Platform AMC

View Provider Charges View Network Charges

Revert to Provider Charges

	Tier Start	Tier End	Rate %	Rate £	Fund Type
			0.00		All

Edit Add Row

Complete details of the deal, starting with the **Tier Start**:

Charge Tier Name
Platform AMC

View Provider Charges View Network Charges

Revert to Provider Charges

	Tier S...	Tier E...	Rate %	Rate £	Curre...	Select Fu...	Remove
1	<input type="text"/>				All		

Cancel Edit Add Row

	Tier S...	Tier E...	Rate %	Rate £	Curre...	Select Fu...	Remove
1	<input type="text" value="0"/>				All		

Cancel Save

Click away and the value will update.

Cancel Edit
Add Row

	Tier S...	Tier E...	Rate %	Rate £	Curre...	Select Fu...	Remove
1	£0.00	£49,9...	0.35		All		

Cancel
Save

Once the first row is complete, **Add Row** to continue:

Charge Tier Name
Platform AMC

View Provider Charges
View Network Charges

↶ Revert to Provider Charges

Cancel Edit
Add Row

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£49,99...	0.35		All		
2					All		

Cancel
Save

Once all tiers are completed, **Save**

Cancel Edit
Add Row

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£49,99...	0.35		All		
2	£50,00...	£99,99...	0.30		All		
3	£100,0...	£499,9...	0.25		All		
4	£500,0...	£749,9...	0.20		All		
5	£750,0...	£999,9...	0.15		All		
6	£1,000...		0.10		All		

Cancel
Save

Charge Tier Name
Platform AMC

View Provider Charges
View Network Charges

↶ Revert to Provider Charges

Edit
Add Row

	Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£49,999.00	0.35		All
2	£50,000.00	£99,999.00	0.30		All
3	£100,000.00	£499,999.00	0.25		All
4	£500,000.00	£749,999.00	0.20		All
5	£750,000.00	£999,999.00	0.15		All
6	£1,000,000.00		0.10		All

Example 2

Special deal is per individual wrapper, not by Platform AMC.

In Synaptic Pathways, for Abrdn, charges are set by individual wrapper, rather than Platform AMC. If the Platform AMC is blank (as seen below) you can continue inputting individual wrapper charges further down.

Charge Tier Name
Platform AMC

[View Provider Charges](#) [View Network Charges](#)

[↩ Revert to Provider Charges](#)

[Edit](#) [Add Row](#)

Tier Start	Tier End	Rate %	Rate £	Fund Type
1			0.00	All

If you have an existing deal in place you will need to **Revert to Provider Charges** :

Charge Tier Name
Platform AMC

[View Provider Charges](#) [View Network Charges](#)

[↩ Revert to Provider Charges](#)

[Edit](#) [Add Row](#)

Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£49,999.00	0.35	All
2	£50,000.00	£99,999.00	0.30	All
3	£100,000.00	£499,999.00	0.25	All
4	£500,000.00	£749,999.00	0.20	All
5	£750,000.00	£999,999.00	0.15	All
6	£1,000,000.00		0.10	All

This will remove your deal and revert back to default provider charges:

Charge Tier Name
Platform AMC

[View Provider Charges](#) [View Network Charges](#)

[↩ Revert to Provider Charges](#)

[Edit](#) [Add Row](#)

Tier Start	Tier End	Rate %	Rate £	Fund Type
1			0.00	All

Each wrapper will have it's own set of charges and you will need to amend all wrappers that you have a deal for. This includes **GIA, Onshore Bond, Offshore Bond, ISA, SIPP & Income Drawdown AMC**

We will use an **Income Drawdown** as an example:

Income Drawdown

▼ Wrap SIPP

Charge Tier Name
Drawdown AMC

[View Provider Charges](#) [View Network Charges](#)

[↩ Revert to Provider Charges](#)

[Edit](#) [Add Row](#)

Tier Start	Tier End	Rate %	Rate £	Fund Type
£0.00	£249,999.99	0.40		All
£250,000.00	£749,999.99	0.30		All
£750,000.00	£999,999.99	0.20		All
£1,000,000.00		0.15		All

Edit

	Tier Start	Tier End	Rate %	Rate £	Fund Type
1	<input type="text" value="0"/>			0.40	All
2	£250,000.00	£749,999.99		0.30	All
3	£750,000.00	£999,999.99		0.20	All
4	£1,000,000.00			0.15	All

Enter the details of the deal, using the pen icon:

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£249,9...	0.35		All		
2	£250,0...	£749,9...	0.30		All		
3	£750,0...	£999,9...	0.20		All		
4	£1,000...		0.15		All		

	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£249,9...	0.35		All		
	<input type="text" value="0.25"/>				All		
3	£750,0...	£999,9...	0.20		All		
4	£1,000...		0.15		All		

Once complete. **Save**

Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove
1	£0.00	£249,9...	0.35	All		
2	£250,0...	£749,9...	0.25	All		
3	£750,0...	£999,9...	0.15	All		
4	£1,000...		0.10	All		

Cancel Edit Add Row

Cancel Save

Charge Tier Name
Drawdown AMC

View Provider Charges View Network Charges

Revert to Provider Charges

Tier Start	Tier End	Rate %	Rate £	Fund Type
1	£0.00	£249,999.99	0.35	All
2	£250,000.00	£749,999.99	0.25	All
3	£750,000.00	£999,999.99	0.15	All
4	£1,000,000.00		0.10	All

Edit Add Row

Check the deal is set to **Active** at the top of the screen:

Name abrdn Wrap	Provider abrdn Wrap	Portfolio -	Deal Start Date (leave blank to apply from today) <input type="text"/>
Active Not Active	Platform All Platform Products	Special Deal Type -	Deal End Date (leave blank for no expiry date) <input type="text"/>