# Switching - Family Assets Under Management

Last Modified on 29/02/2024 10:50 am GMT

#### This article is a continuation of Switching - Fees

### Add family assets under management with the **Target Scheme** area:

Synaptic Pathways Home Paraplanner Access Centre	Contacts v Research v Portfolio Builder v Investment Pathways Generic Funds v Config	uration Fund Lists 🗸 Knowledge Base My Apps & Settings Valuations 🖌
Test Pension Switch		Edit Delete Get Illustration
ent Description Illustration Type Isanna West Test Description Whole of Market	Segment Name Policy Type Pensions	
	Research	✓ Mark Status as Complete
Ceding Scheme	Target Scheme	Outcome
Consolidated Scheme      Current Value     Maturity Value     E366,778.00     E427,135.71     Growth Rate (Md)     R.V      1.50%     O.66%      Add Coding Scheme	Investment           Switches/Trades           Fees           Family AUM Family AUM Family AUM	Nue for this illustration, use Critical Viela Hurdle Rate 1.27% - 0.23% Growth Rate (Mid) RLV 1.50% 0.46% [* Report
AEGON	Results	Comparison Report
Current Value Maturity Value £102,555.00 £104,523.00 Growth Rate (Md) RJ:Y 1.50% 2.48%	Consolidated Ceding Schemes Projection of aggregated schemes for the purpose of comparison	Growth Final Value Total Fees BLV 0.84% £427,135.71 £29,538.24 0.66%
	Stakeholder Pension	1 of 1 Results
Quilter         Image: Current Value           £254,123.00         £322,612.71	Stakeholder Pension Basic Pension for Comparison Purposes	Growth Final Value Total Fees RLY 0.01% £394,989.50 £61,514.97 1.49%

If you do not wise to include Family AUM, unselect the toggle:

Research Test Pension S	Switch				Edit Delete Get Illustr
	Description Test Description	Illustration Type Whole of Market	Segment Name	Policy Type Pensions	
111				Research	✓ Mark Status as Com
ing Scheme			Target Scheme	Outcome	
_			Investment	+ Family Assets Under Management	
Consolidated Scheme		Switches/Trades	Use the calculated value for Family Assets Under Management or enter a value for this illustration, use calculate to revert to the calculated value.		
Current Value £356,778.00	Maturity Value £427,135.71		Fees	Includes Family Assets Contral Yield 1.27%	Hurdle Rate - <b>0.23%</b>
Growth Rate (Mid) 1.50%	RJ.Y 0.66%		Family AUM	Growth Rate (Mid) Edit Family Assets 1.50%	R.LY 0.46%
+ Add Ceding Scher	ne		Results		E+ Report
Current Value	Maturity Value		Results		
£102,655.00 Growth Rate (Mid) 1.50%	£104,523.00 RLY 2.48%			Consolidated Ceeting Schemes         Total Fees           Projection of aggregated schemes for the purpose of comparison         0.84%         £427,135.71         £29,538.24	R.L.Y 0.66%
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🖾 Quilter					
Current Value <b>£254,123.00</b>	Maturity Value £322,612.71			Stakeholder Pendon         Growth         Final Value         Total Fees           Basic Pension for Comparison Purposes         0.01%         £394,989.50         £61,514.97	R.LY 1.49%

Update Results once done:

Target Scheme				Outcome		
Investment Switches/Trades Fees Family AUM	Family Assets Under Management Use the calculated value for Family Assets Under Management or enter a val calculate to revert to the calculated value. Includes Family Assets Includes Family Assets Edit Family Assets	ue for this illustration, use		Critical Yield 1.27% Growth Rate (Mid) 1.50%	Hurdie Rati -0.23% R.LY 0.46%	e [+ Report
Results				Comp	arison Report	C <sup>update Results</sup>
	Consolidated Ceding Schemes Projection of aggregated schemes for the purpose of comparison	Growth 0.84%	Final Value £427,135.71	Total Fees £29,538.24	R.LY <b>0.66%</b>	
						1 of 1 Results
	Stakeholder Pension Basic Pansion for Commarison Purposes	Growth 0.01%	Final Value £394,989,50	Total Fees £61,514.97	R.I.Y 1.49%	

If you wish to include Family AUM, leave the toggle selected and **Edit Family Assets** if needed:

Target Scheme			Outcome		
Switches/Trades	+ Family Assets Under Management Use the calculated value for Family Assets Under Management or enter a v calculate to revert to the calculated value. ncludes Family Assets	value for this illustration, use	Critical Yield 1.27% Growth Rate (Mid) 1.50%	It Hurdle Rate -0.23% R.LY 0.46% [→ Repo	rt
Results			Comp	arison Report 🛛 C <sup>er</sup> Updat	e Results
	Consolidated Ceding Schemes Projection of aggregated schemes for the purpose of comparison		Value Total Fees 135.71 £29,538.24	R.LY 0.66%	
				0.66%	1 Results

You can edit existing assets by selecting the pen icon:

	Client & Family AUM					
	Assets Under Management Please enter your client's existing and family assets. Some Providers offer discounts when existing money is on a platform or product. The details entered here can be used in illustrations.					
Platforms	a Platform	+ Add Platform				
Select	Platform Name ↑	Client AUM £	Family AUM £			
1	abrdn Wrap	£0.00	£20,000.00	≜		
2	Aegon Platform	£0.00	£0.00	<del></del>		
3	AEGON Retirement Choices	£15,000.00	£0.00	會		
4	AJ Bell Investcentre	£80,000.00	£0.00	會		
5	Aviva Wrap	£1,000,000.00	£550,000.00	會		
6	Fidelity	£0.00	£325,000.00	曲		
7	LV= (Off-Platform)	£287,933.69	£0.00	<u></u>		
8	Quilter	£497,028.96	£0.00	-		
9	Quilter (Off-Platform)	£151,527.15	£0.00	<u></u>		
10	Transact	£571,695.00	£2,000,000.00	Ê		
			Close	ОК		

## Add amount and $\mathbf{OK}$

	Client & Family AUM					
	Assets Under Management Please enter your client's existing and family assets. Some Providers offer discounts when existing money is on a platform or product. The details entered here can be used in illustrations.					
Platforms Select	Platforms   Select a Platform   Add Platform					
	Platform Name ↑	Client AUM £	Family AUM £			
1	abrdn Wrap	30000	£20,000.00	<b></b>		
2	Aegon Platform	zu.uu	£0.00	Ê		
3	AEGON Retirement Choices	£15,000.00	£0.00	<b></b>		
4	AJ Bell Investcentre	£80,000.00	£0.00	Ê		
5	Aviva Wrap	£1,000,000.00	£550,000.00	<b></b>		
6	Fidelity	£0.00	£325,000.00	<b></b>		
7	LV= (Off-Platform)	£287,933.69	£0.00	<u></u>		
8	Quilter	£497,028.96	£0.00	<u>_</u>		
9	Quilter (Off-Platform)	£151,527.15	£0.00	÷		
10	Transact	£571,695.00	£2,000,000.00	<b></b>		
	Close					

Add a new family asset through the Platforms dropdown:

	Client & Famil	y AUM			
Assets Under Management lease enter your client's existing and family assets. Sor	ne Providers offer discounts when existing money	is on a platform or product. The details entered here can be used in illu	ustrations.		
orms elect a Platform	Add Platform				
7IM Platform	Client AUM £	Family AUM £			
AJ Bell Investcentre (RIA)	£30,000.00	£20,000.00	亩		
Elevate	£0.00	£0.00	Ê		
Fidenty (No Investor Fee)	£15,000.00	£0.00	Ê		
	£80,000.00	£0.00	Ê		
James Hay Modular iPlan	£1,000,000.00	£550,000.00	â		
James Hay Partnership Wrap	£0.00	£325,000.00	台		
M&G Wealth Platform	£287,933.69	£0.00	÷		
Morningstar Wealth Administration Limited	£497,028.96	£0.00	÷		
	£151,527.15	£0.00	ŵ		
Nucleus	£571,695.00	£2,000,000.00	â		
Parmenion					

## Click +Add Platform

Platforms		
Elevate	<ul> <li>Add Platform</li> </ul>	]
Platform Name ↑	Client AUM £	

Complete details of family asset and click  ${\bf OK}$ 

	Client & Family AUM					
	Assets Under Management Please enter your client's existing and family assets. Some Providers offer discounts when existing money is on a platform or product. The details entered here can be used in illustrations.					
	Platforms       Select a Platform <ul> <li>Add Platform</li> <li>Add Platform</li> </ul>					
	Platform Name ↑	Client AUM £	Family AUM £			
1	abrdn Wrap	£30,000.00	£20,000.00	<b></b>		
2	Aegon Platform	£0.00	£0.00	Ê		
3	AEGON Retirement Choices	£15,000.00	£0.00	☆		
4	AJ Bell Investcentre	£80,000.00	£0.00	Ê		
5	Aviva Wrap	£1,000,000.00	£550,000.00	<u>_</u>		
6	Elevate	£40,000.00	£0.00	÷		
7	Fidelity	£0.00	£325,000.00	÷		
8	LV= (Off-Platform)	£287,933.69	£0.00	_ <u></u>		
9	Quilter	£497,028.96	£0.00	- <u></u>		
10	Quilter (Off-Platform)	£151,527.15	£0.00	 []]		
11	Transact	£571,695.00	£2,000,000.00	台		
	Close OK In					

## See article Switching - Comparison Report