

Creating a special deal for Abrdn

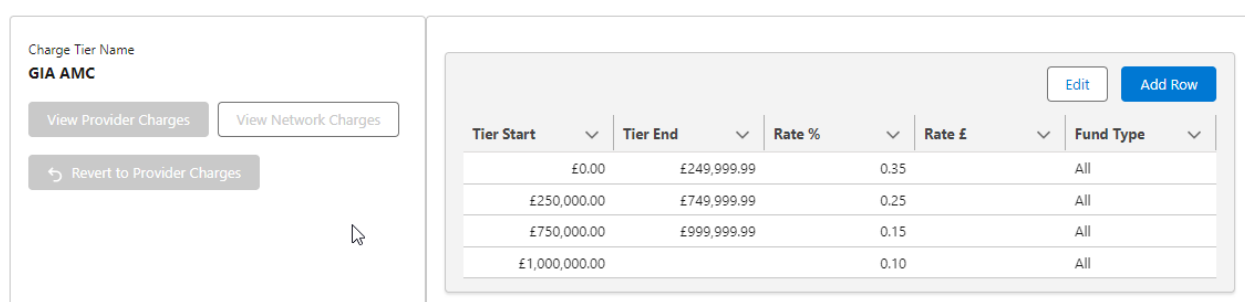
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In Synaptic Pathways, you are able to create special deals for Providers. Provider charging structures can vary and may need to be setup differently to ensure the deal pulls through correctly.

For the Abrdn Platform, Synaptic Pathways has charging set up at individual wrapper level to include the additional charges for SIPP and Bonds.

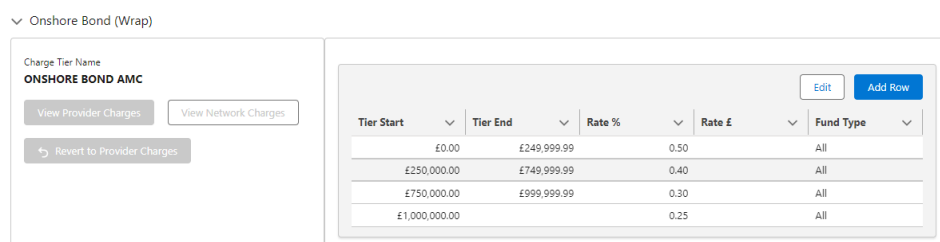
For example, In Synaptic Pathways the standard charge for GIA looks like this:

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



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

The 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	£249,999.99	0.50		All
£250,000.00	£749,999.99	0.40		All
£750,000.00	£999,999.99	0.30		All
£1,000,000.00		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

View Provider ChargesView Network Charges

Revert to Provider Charges

EditAdd Row

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

View Provider ChargesView Network Charges

Revert to Provider Charges

Cancel EditAdd Row

	Tier S...	Tier E...	Rate %	Rate £	Curre...	Select Fu...	Remove
1	£0.00	£249,...	0.35		All		
2	£250,...	£749,...	0.25		All		
3	£750,...	£999,...	0.15		All		
4	£1,00...		0.10		All		

CancelSave

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

Cancel EditAdd Row

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

Charge Tier Name
GIA AMC

View Provider Charges
View Network Charges

Revert to Provider Charges

Cancel Edit
Add Row

	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

Edit
Add Row

	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

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

Edit
Add Row

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

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

Cancel Edit
Add Row

	Tier S...	Tier E...	Rate %	Rate £	Curre...	Select Fu...	Remove
1					All		

Cancel Edit
Add Row

	Tier S...	Tier E...	Rate %	Rate £	Curre...	Select Fu...	Remove
1	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

						Edit	Add Row
	Tier Start	Tier End	Rate %	Rate £	Fund Type		
1	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:

							Cancel Edit	Add Row
	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			
							Cancel	Save

							Cancel Edit	Add Row
	Tier St...	Tier End	Rate %	Rate £	Curren...	Select Fun...	Remove	
1	£0.00	£249,9...	0.35		All			
	0.25				All			
3	£750,0...	£999,9...	0.20		All			
4	£1,000...		0.15		All			
							Cancel	Save

Once complete. **Save**

Cancel Edit
Add Row

	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
Save

Charge Tier Name
Drawdown AMC

View Provider Charges
View Network Charges

Revert to Provider Charges

EditAdd Row

	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

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

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