In-House Discretionary -Platforms & Products

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

This article is a continuation of In-House Discretionary - Asset Allocation

In an In-House Discretionary Portfolio, you are able to add Platforms and Products that the product can be purchased through.

Synaptic Pathways Home Contacts V Research V	Q. Search Portfolio Builder Investment Pathways Configuration Fund Lists V Knowledge Base Mg	y Apps & Settings Valuations
Portfolio IHD Test Portfolio		Duplicate Portfolio Import Funds Edit 💌
 Details Artfolio Builder Compliance of Asse Partfolio Builder Compliance of Asse Partform Off Platform Products How it Works How it Works available, add the Platform and Products and added, the product on the platform which are supported and here included and here oncluded and here oncluded and here oncluded and here oncluded and here oncluded. Compliance of the Platform Products and added and removed by first settering the Criff-Platform Product tas and using the search area provided. The availability of the Portfolio will be considered when using the Product in order and and using the Search area provided. The availability of the Portfolio will be considered when using the Papots review.	Allocation Platforms & Products Rearch Available Platforms Patforms & Products Search Available Platforms Q. Search by Name Search and Add Platforms to include in the In-House Discretionary Fund Management Portfolio.	Products

Use the Search box to find available platforms:

Platforms Off Platform Products				
How it Works	Search Available Platforms		Available On Platform Products	
sing the search options available, add the Platforms and roducts that the Fortfolic can be purchased through. Once a statism has been added, the products on the platform which are opported can be included or excluded. romove an entire platform and all the underlying products, elect the remove icon against the Platform in the availability list. HP-Platform Products can added and removed by first selecting or GP-Platform Products than and using the service and neuroided.	A A A A A A A A A A A A A A	L3		
he wallability of the Portfolio will be considered when using the ortfolio in comparison research or during an Ex-ante proposal or x-post review.	Aegon Platform AEGON Retirement Choices ABGIN Retirement Choices Al Bell Investcentre Al Bell Investcentre (RIA)			
	+ Ascentric - The Whole of Market Wrap + Aviva Wrap	.		

Click the + button to select the Platform:

How it Works	Search Available Platforms	Available On Platform	n Products				
ing the search options available, add the Platforms and oducts that the Portfolio can be purchased through. Once a	Q A	✓ abrdn Wrap					
form has been added, the products on the platform which are ported can be included or excluded.	abrdn Wrap						
remove an entire platform and all the underlying products,	+ Advance by Embark Platform	Product Name 🗸	Provider Name V	Product Type 🛛 🗸	Product Basis 🗸 🗸	Included \lor	
ct the remove icon against the Platform in the availability list.		abrdn Wrap - GIA	Standard Life Savings Lim	General Investment Acco	General Investment Acco	~	
Platform Products can added and removed by first selecting	+ Aegon Platform	abrdn Wrap ISA	Standard Life Savings Lim	Individual Savings Accou	ISA	 Image: A set of the set of the	
e Off-Platform Product tab and using the search area provided.	AEGON Retirement Choices	International Portfolio Bo	Standard Life International	Offshore Bonds	Unit Linked	 Image: A set of the set of the	
availability of the Portfolio will be considered when using the folio in comparison research or during an Ex-ante proposal or	AEGON Retirement Choices	Onshore Bond (Wrap)	Standard Life Assurance	Investment Bond	Unit Linked	~	
-post review.	+ AJ Bell Investcentre	Wrap SIPP	Standard Life Assurance	Self Invested Personal Pe	Full	×	
		Wrap SIPP	Standard Life Assurance	Income Drawdown	Income Drawdown	~	
	+ AJ Bell Investcentre (RIA)						
	+ Aviva Wrap	> AEGON Retirement	Choices				
	Elevate						

Once added, products under the platforms can be excluded/included:

 abrdn Wrap 				
Product Name 🗸 🗸 🗸	Provider Name 🗸 🗸	Product Type V	Product Basis 🗸 🗸 🗸	Included \lor
abrdn Wrap - GIA	Standard Life Savings Lim	General Investment Acco	General Investment Acco	R
abrdn Wrap ISA	Standard Life Savings Lim	Individual Savings Accou	ISA.	<u>_</u>
International Portfolio Bo	Standard Life International	Offshore Bonds	Unit Linked	~
Onshore Bond (Wrap)	Standard Life Assurance	Investment Bond	Unit Linked	~
Wrap SIPP	Standard Life Assurance	Self Invested Personal Pe	Full	~
Wrap SIPP	Standard Life Assurance	Income Drawdown	Income Drawdown	 Image: A set of the set of the

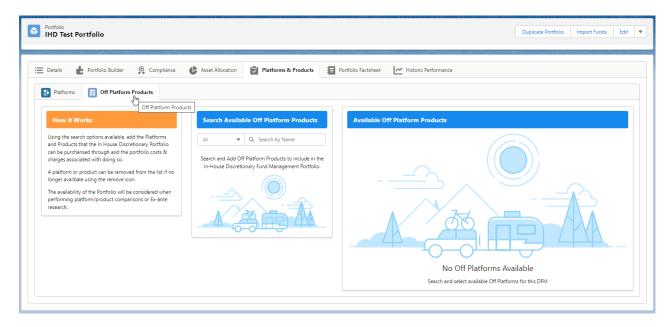
As Platforms are added, they will appear minimised. They can be maximised and minimised through the arrow on the left side:

🗸 abrdn Wrap				
				1 1 1
Product Name \lor	Provider Name V	Product Type V	Product Basis 🗸 🗸	Included $\!$
abrdn Wrap - GIA	Standard Life Savings Lim	General Investment Acco	General Investment Acco	
abrdn Wrap ISA	Standard Life Savings Lim	Individual Savings Accou	ISA.	~
International Portfolio Bo	Standard Life International	Offshore Bonds	Unit Linked	~
Onshore Bond (Wrap)	Standard Life Assurance	Investment Bond	Unit Linked	~
Wrap SIPP	Standard Life Assurance	Self Invested Personal Pe	Full	~
Wrap SIPP	Standard Life Assurance	Income Drawdown	Income Drawdown	 Image: A set of the set of the

To remove a Platform and all the underlying assets, unselect the Platform:

Search Available Platforms	ilable Platforms Available On Platform Products						
A A	🗸 abrdn Wrap				ß		
+ Advance by Embark Platform	Product Name \lor	Provider Name 🗸 🗸	Product Type V	Product Basis V	Included \sim		
	abrdn Wrap - GIA	Standard Life Savings Lim	General Investment Acco	General Investment Acco			
+ Aegon Platform	abrdn Wrap ISA	Standard Life Savings Lim	Individual Savings Accou	ISA	~		
AEGON Retirement Choices	International Portfolio Bo	Standard Life International	Offshore Bonds	Unit Linked	 Image: A set of the set of the		
	Onshore Bond (Wrap)	Standard Life Assurance	Investment Bond	Unit Linked	~		
+ AJ Bell Investcentre	Wrap SIPP	Standard Life Assurance	Self Invested Personal Pe	Full	~		
+ AJ Bell Investcentre (RIA)	Wrap SIPP	Standard Life Assurance	Income Drawdown	Income Drawdown	~		
V Aviva Wrap	> AEGON Retirement (Choices					
Elevate	> Aviva Wrap						
±	> Elevate						

Off-Platforms products can be added and removed through the Off-Platform tab:



The availability of the portfolio should be considered when performing platform/product comparisons or ex-ante research.

Once you have added the platforms & off-platform products to the portfolio, the costs & charges associated with the portfolio will be pulled through when conducting research.

A special deal can be added for each platform/product added. This will allow you to create a deal specific to the use of the In-House Discretionary Portfolio in Research.

For further information on Switch research, see article In-House Discretionary - Portfolio Factsheet