



Elevate

Changing regular contributions

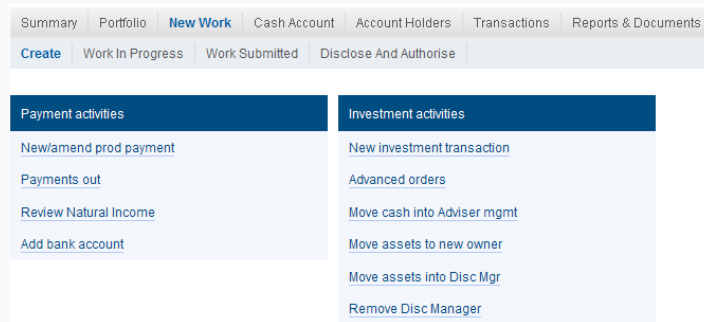
For financial adviser use only.
It should not be distributed to,
or relied upon by, retail clients.

Standard Life 

Changing regular contributions

What you will see

Change the amount, payment date, asset allocation or cancel a regular contribution.



What you will need to do

Increasing the amount

- ▶ You can keep an existing regular contribution in place and set up a second regular contribution for the extra amount by going to **New Work > New/amend prod payment**.
- ▶ Alternatively, you can contact us to cancel the existing instruction and set up a new regular contribution for the whole amount.

Reducing the amount or changing the payment date

- ▶ Contact us to cancel the existing instruction and set up a new regular contribution through **New Work > New/amend prod payment**.

Cancelling a regular contribution

- ▶ Contact us to cancel the existing instruction.

Notes

- ▶ If the date and frequency for the additional regular contribution is the same, only a single consolidated transaction will be taken from your client's bank account.
- ▶ If the next payment date is within 8 working days, the contribution for that month cannot be cancelled.
- ▶ Any Spread Initial Adviser Charge (SIAC) will continue to be taken even when a regular payment is cancelled. To cancel a SIAC go to **Charges & Remunerations > Agreed Remuneration > Amend Agreed Remuneration**.

Changing the asset allocation

What you will see

1. Go to the clients account and select **Transactions > Deposits/Withdrawals**.

2. Find the regular payment and click **Edit Investments**.

3. Confirm if advice has been given.

4. Click **Remove** to clear any existing investments.

5. Select **%** or **£** amount to invest for each investment.

6. In **Search Criteria**, search investments and click **Select** next to your selection.

7. Allocate the payment to each investment (including Product Cash).

8. Click **Generate**

9. Tick to confirm you have client authority to carry out this transaction

10. Click **Confirm**.

What you will need to do

1. Go to the clients account and select **Transactions > Deposits/Withdrawals**.
2. Find the regular payment and click **Edit Investments**.
3. Confirm if advice has been given.
4. Click **Remove** to clear any existing investments.
5. Select **%** or **£** amount to invest for each investment.
6. In **Search Criteria**, search investments and click **Select** next to your selection.
7. Allocate the payment to each investment (including Product Cash).
8. Click **Generate**
9. Tick to confirm you have client authority to carry out this transaction
10. Click **Confirm**.

Notes

- ▶ Only users with **Transact** access can change the asset allocation.
 - ▶ Users with **Administrator or Management** access cannot currently change the asset allocation.
4. You may want to make a note of the current instruction before you cancel it, as once an investment has been cancelled it will disappear.
 5. In **Search Type**, you can select **Cash** if you want to allocate anything to Product Cash.
 6. The total allocation must equal the total value of the regular payment (or come to 100%) - the payment amount cannot be changed.
 7. This will generate a **Charges Information document**.

Helpful hints

- ▶ You can view the amended regular investment by going to **Transactions > Deals** and using the selection boxes to view **Regular** deals under **Batch Type**.
- ▶ If you want to change the current investment allocations for an existing regular contribution, you must select clean share class funds for all investments.
- ▶ Changes to the investment selection will be applied to all future payments (including any still awaiting investment).
- ▶ You can view details of regular contributions by going to **Transactions > Deposits/Withdrawals**.
- ▶ If you have set up a new or additional regular contribution, you can only select clean share class funds when setting the investment allocation.
- ▶ Save your progress by clicking **Save and Exit**. You can resume at any time by going to **New Work > Work in Progress**.

Get to know us better

We hope you've got a good insight into our platform and the potential benefits it can bring to you and your firm.

If there is anything more you want to know, please contact us.

Call us on 0345 600 2399

Our lines are open 8am to 6pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at enquiries@elevateplatform.co.uk

Please be aware that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

Follow us on Twitter [@Elevateplatform](https://twitter.com/Elevateplatform)

Address

Elevate, PO Box 6877, Basingstoke, RG24 4RT

elevateplatform.co.uk

Elevate, Winterthur Way, Basingstoke, RG21 6SZ (postal address).

Elevate Portfolio Services Limited trades as Elevate and is part of Standard Life Aberdeen group. Elevate Portfolio Services Limited (01128611) is registered in England at 14th Floor, 30 St. Mary Axe, London EC3A 8BF and authorised and regulated by the Financial Conduct Authority.

© 2017 Standard Life Aberdeen, images reproduced under licence. All rights reserved.

SLE0118 0817