



Individual request for special terms



For adviser use only.

This form should only be used to request **£1m+** terms for single WP numbers which currently have **£1m+** in platform eligible assets on Wrap.

To request **£1m** terms, you must

- Ensure that the single WP number has a minimum of **£1m** Platform Eligible Assets (PEA)
- Run a charges summary to ensure your client's current Wrap charge means that the policy would benefit from moving to an equivalent flat charge of 0.15% (**£1m+** terms)
- Complete, date and sign this form, and submit this form **and** the charges summary to **Wrap.1m.Terms@abrdn.com**

A separate form should be completed for **each** account you wish to apply these terms to.

Please note **£1m+ terms are available only where a single WP number has a minimum of **£1m** PEA.**

If the level of assets (including linked assets) increases significantly, you may wish to review these terms to ensure that they remain appropriate. You can request the **£1m+** terms be removed at any time via your account manager, and the charges on the policy will revert to your adviser level terms. For further information regarding **£1m+** terms please visit abrdn.com/platform-adviser/wrap/charges.

For any queries relating to clients not yet on Wrap, or relating to **£1m+** terms in general please contact your usual abrdn contact/Account Manager.

Please also ensure that where your client has the Drawdown Lock in place, you are happy for us to drop the lock rate to 15bps. If you have any questions on the impact of the Drawdown Lock please contact your usual abrdn contact/Account Manager.

For any queries please contact your usual abrdn contact/Account Manager.

WP number (if applicable) and client name

Firm name and abrdn contact/Account Manager

Fund value, including confirmation that there is more than **£1m** in Platform Eligible Assets (PEA) in a single WP number

Confirmation

I confirm that I am happy for the terms of this policy to be updated to the **£1m+** terms i.e. an equivalent flat charge of 0.15% where the total PEA in the single WP number is more than **£1m**.

Signature

Date
(DD/MM/YYYY)

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Signature required

abrdn will confirm if this request has been accepted and if the terms have been updated.

Issued by a member of abrdn group, which comprises abrdn plc and its subsidiaries.

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