



More Value For Wealth Clients

For adviser use only.

How do my wealth clients benefit?

All individual clients with £1million or more in platform eligible assets (PEAs) in a single account can benefit from a 0.15% equivalent flat fee. The flat fee only applies to the single account with individual PEAs of at least £1million and will not apply to family-linked assets.

Platform Eligible Assets (PEA)	Platform Charge (All products) (%)
£0 to £199,999.99	0.31
£200,000 to £999,999.99	0.11
£1m plus	0.15

Clients will not always be better off on these terms therefore we will not automatically update them.

What happens if my client's assets fall below £1m PEA?

If you choose to move your client to the equivalent flat charge, then the pricing structure above will apply. This structure will not be removed if the amount invested falls below £1m PEA but the charge will increase in line with these charges.

How do I request this for a client?

Please complete the request form (WRAP342) which can be found on our [website](#). A completed, signed copy should be submitted to Wrap.1m.Terms@abrdn.com, along with a Charges Summary Document.

Submissions that do not satisfy the requirements for £1million+ PEAs in a single WP number will be rejected.

Where the request is for new business (either entirely or to top up existing business), the new terms will not be applied until the transfers have completed and the total platform eligible assets are greater than £1million.

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

For more information visit abrdn.com/adviser

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What happens when we have already quoted for £1m+ cases but due to market down turn the figure is now less than this?

Where Existing Business had the required £1m+ PEAs in a single account when the quote was accepted, we will still honour the agreed terms.

Where a quote was accepted for new business, either entirely or to top up existing business, we will require evidence dated in the last 6 weeks that shows that the total value of transfer plus existing business was >£1m.

What if the Property element of a portfolio cannot be transferred due to the freezing of Property funds? Will we still agree to apply the £1m+ terms?

We can only agree to apply the terms previously quoted, if we have evidence that the total value of the monies transferred is at least £1million. So if the money cannot be transferred and the total transfer amount is less than £1million then we cannot apply the terms. This is because there is no guarantee that money will be moved once property funds have been unfrozen.

Please note if your client does not have at least £1million PEA in a single Wrap account then unfortunately we will not be able to apply the special terms.