Enhancing Client Reviews with Wrap

28 August 2025


Barny Howe
Platform
Consultant

Alex Etchells
Platform
Consultant

Contents & objectives

We're pleased to invite you to this practical webinar designed to help you strengthen the quality and effectiveness of your client review meetings. With increasing expectations around transparency, value, and personalised advice, this session will provide the tools and knowledge you need to deliver reviews that truly resonate with your clients and meet regulatory standards

1. **Master the Review Framework** – Learn how to structure client reviews that align with Consumer Duty, focusing on suitability, performance, and future planning.

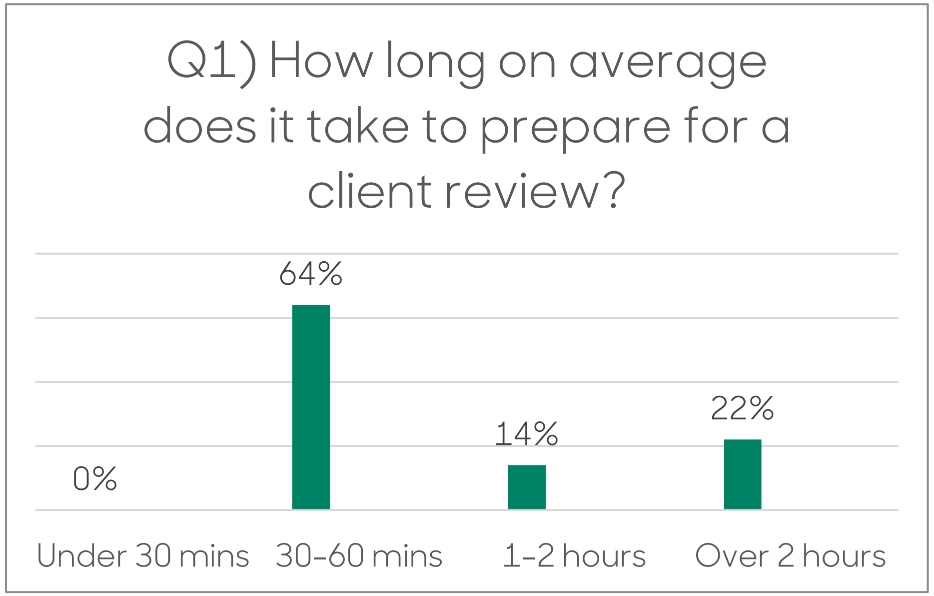
2. **Optimise Platform Tools** – Discover how to leverage Wrap features — like family linking, digital reporting, and tax wrappers—to enhance client outcomes.

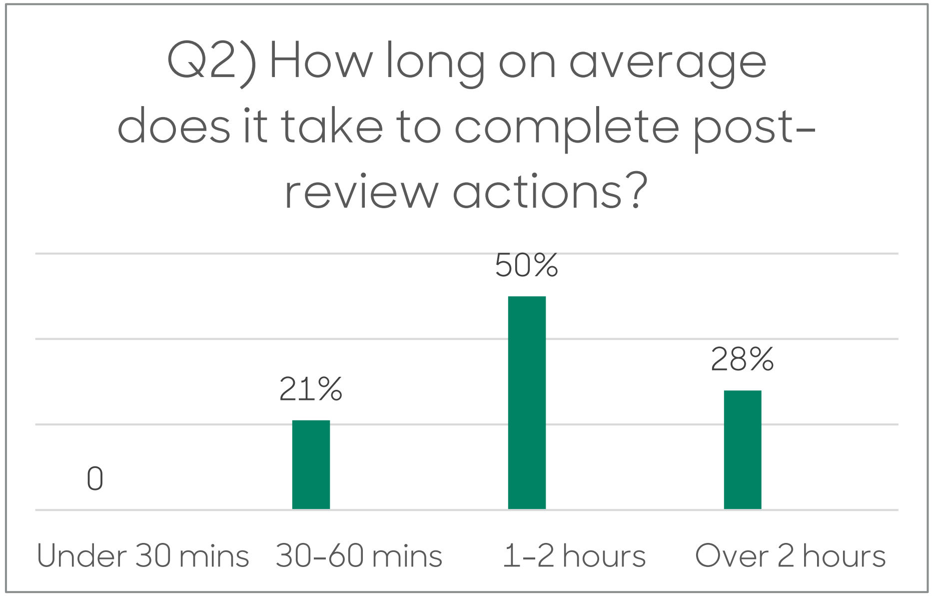
3. **Demonstrate Value with Clarity** – Gain confidence in presenting charges, performance, and planning strategies in a way that clearly communicates value for money.

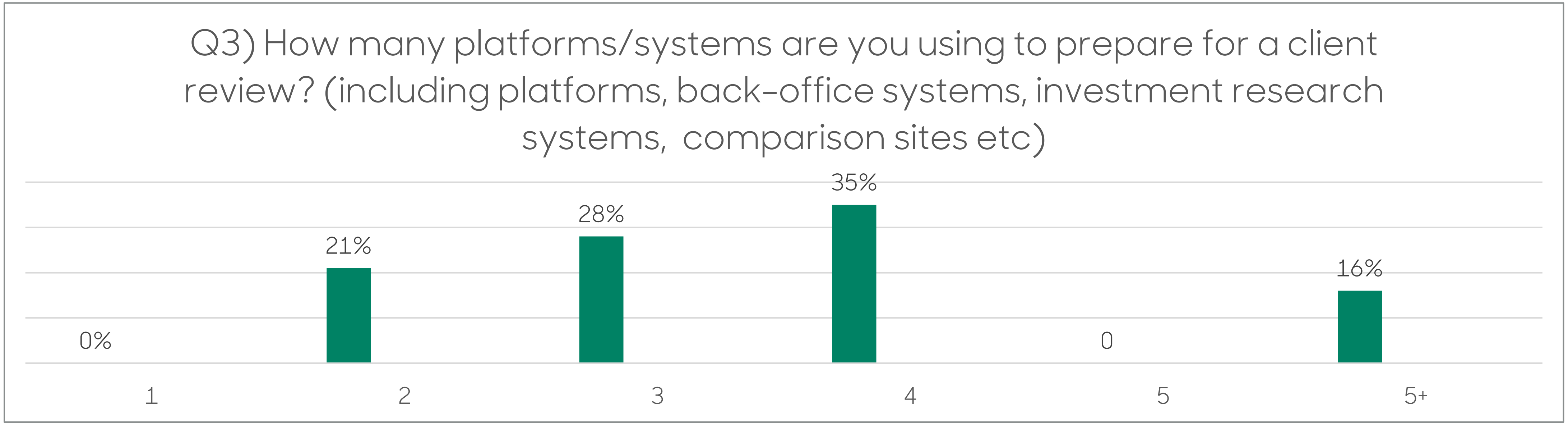
Client Review Survey

Insights & analysis

Client Review Survey







Client Review Survey

Q4) If you could improve one thing about your client review process, what would it be?

'Duplication of back-office reporting'

'Research tools in one place'

'Client interaction & replying to communications timely'

'Single operating system that allows end to end processing'

Reduce number of platforms & processes

'Integrated systems'

'Automation of documents & data'

'Reduce time spent on meeting preparation'

'Less compliance that confuses clients'

'Consistency & accuracy of client prep work'

Client Review Survey

'More graph options for client reporting'

'Easy navigation of client transactions'

'Tailored client reports for review meetings'

Q5) Considering the Aberdeen platforms, what would make the review process easier for you?

'Differentiate between contribution types i.e. Employee versus Employer payments'

'Functionality that doesn't reset criteria each time you analyse data'

'CGT scenario tool'

'SIPP reports to show TFC and taxable income details & allowances'

'Auto generate client reports in line with client review meetings'

'integrated cash flow tool'

'Successful merger of Wrap & Elevate for one central data source '

Why Aberdeen Wrap?

Suitability & due diligence

About us

Aberdeen Adviser are part of Aberdeen Group plc

Aberdeen is a global investment company that helps clients and customers plan, save and invest for the future.

Aberdeen Group is structured around three businesses: Investments, Adviser and interactive investor – focused on the changing needs of our clients.

Aberdeen Adviser business includes Aberdeen Wrap and Aberdeen Elevate platforms, and Aberdeen MPS

AKG A
FINANCIAL STRENGTH RATED
PLATFORM SECTOR SUPERIOR
WWW.AKG.CO.UK ISSUED: 19/08/2024

We have retained our AKG A rating for financial strength for the last 7 years.

£517.6bn

Aberdeen Group plc manage and administer £517.6bn AUMA (as at 30 June 2025).

£75.7bn

Aberdeen Adviser is the UK's second largest adviser platform by AUMA.

As at 30 June 2025 Includes Platform AUA of £72.8bn (2023: £70.9bn) and MPS AUMA of £2.9bn (2023: £2.6bn).

>50%

We have relationships with over half the UK's IFAs. Around 3,000 adviser firms using our platforms.

>400,000

Over 400,000 customers trust us with their savings.

Operational excellence at scale

Our capabilities

We support over 3,000 adviser firms helping around 401,000 individual customers on our platforms*

c5.1m trades processed each month. 99.9% * straight-through

We process c458,000* work items annually

95% Customer satisfaction score. As at 1st March 2025

*Wrap and Elevate. Information correct as at 31 December 2024.

A Service Experience Designed for Confident Delivery

"We understand that exceptional service is essential to the success of our partnership. That's why our model is built around your business—delivering the speed, precision, and expertise needed to ensure consistent performance. We simplify the adviser experience and help drive stronger outcomes for your clients. This is service that adapts to your needs—empowering progress, every day."

Jonny Black, Chief Client Experience Officer

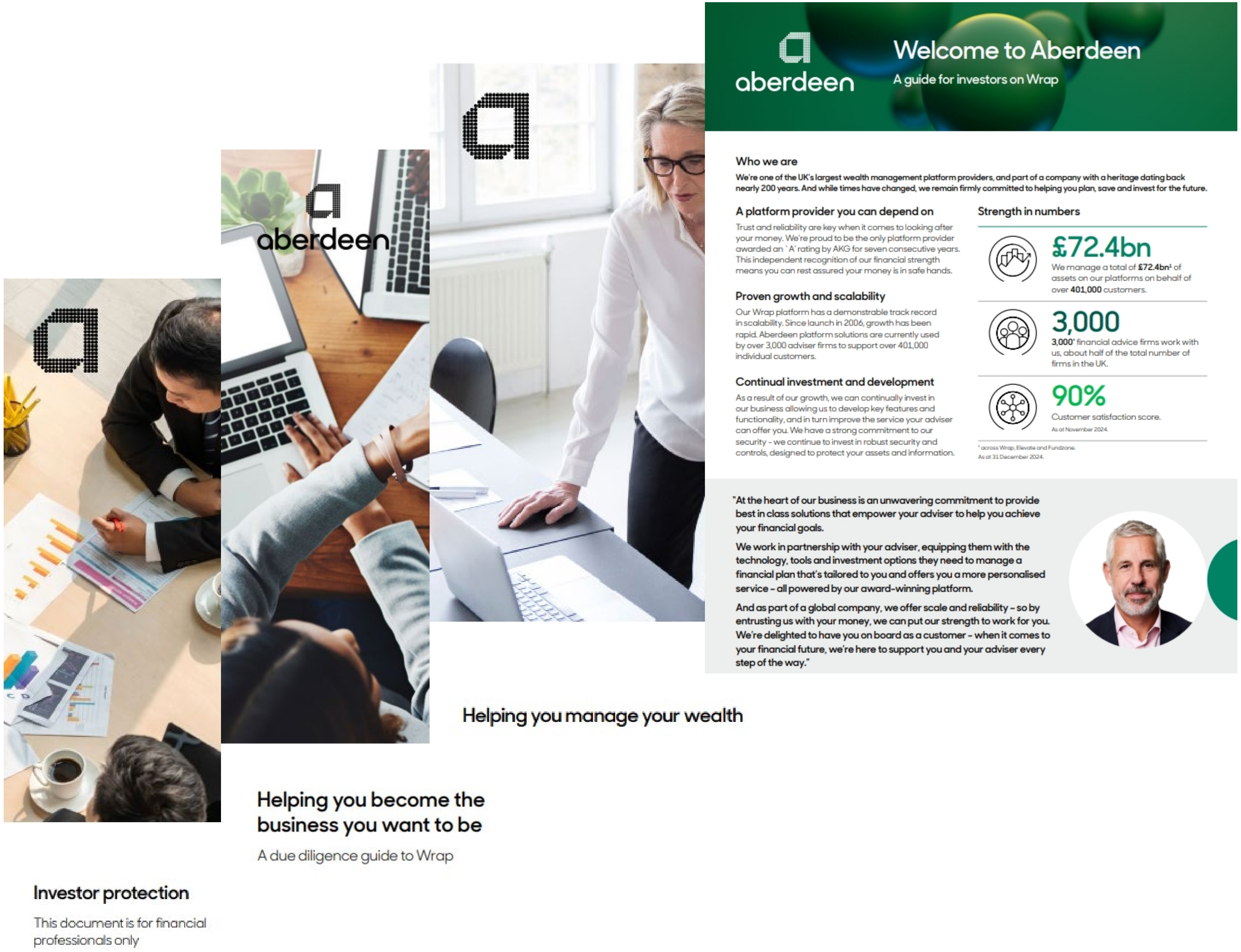
Why Aberdeen Wrap?

Full suite of tax-wrappers
Access the products you need to build a tax-efficient plan for your client and their families.

Drawdown flexibility
Our drawdown price lock allows clients to lock in their platform charge when assets are at their highest.

Competitive price
Our simple, three-tiered charging structure rewards your client with lower charges the more they invest.

Pre-funding
We pre-fund contributions, tax relief and fund switches & rebalances with our money while the client funds are clearing.



Client review

Fact find & analysis

Client Summary

| Total client view

£635,784.55

Total portfolio value as at **12 Aug 2025**

Client last logged in **1286 days** ago

Firm:

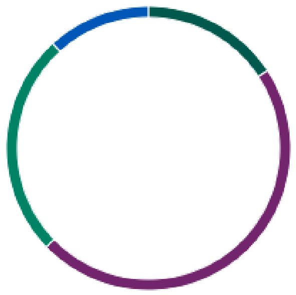
Client ID:

Important notes added

Summary | Investments | Performance | Insights | Transactions | Activity | Documents | Roles | ESG

12/08/2025

Create client portfolio report



Product	Account number	Allocation	Change £	Value
Individual account				
Offshore Bond	-005	15.79%	+£382.27	£100,382.28
ISA Stocks & Shares	-004	46.99%	+£9,156.75	£298,756.65
SIPP	-003	25.46%	+£3,746.17	£161,844.28
Personal Portfolio	-002	11.77%	+£2,421.15	£74,801.34
Cash Account	-001	0.00%	-£4,640.03	£0.00
Total		**100.00%**	**+£11,066.31**	**£635,784.55**

Product Summary

Offshore Bond

Value	£100,382.28
Regular payment in	None
Regular withdrawal	None
Status	Active
Inception Date	28/01/2025
Cash available	£1,448.91

ISA Stocks & Shares

Value	£298,756.65
Regular payment in	None
Regular withdrawal	None
ISA allowance remaining	£20,000.00
Cash available	£5,043.07

SIPP

Value	£161,844.28
Regular payment in	None
Regular income	None
Status	Active
Inception Date	21/11/2014
Cash available	£2,288.61

Personal Portfolio

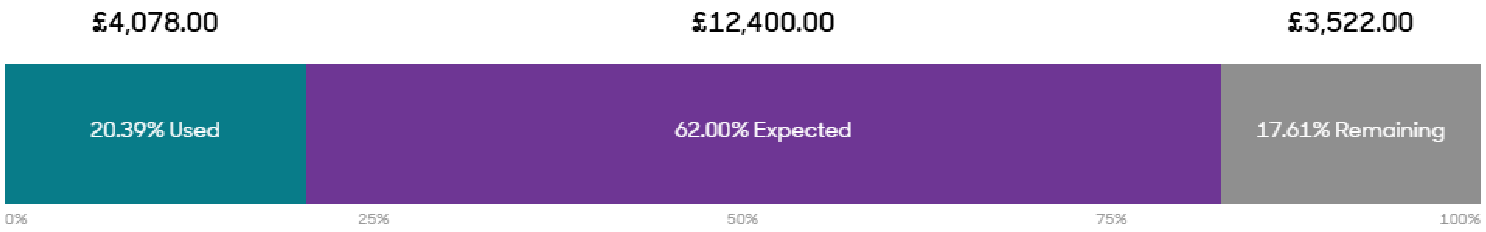
Value	£74,801.34
Regular payment in	None
Regular withdrawal	None
Cash available	£957.57

ISA Regular Premiums

Payment in | Withdrawals | Charges | Product information

ISA allowance

Tax year 2025/2026



View all ISA subscriptions

Active instructions

Current regular payment instructions

	Amount	Frequency	Paid from	Next Payment	Investment allocation	
Client	£1,550.00	Monthly		2025-09-01	View	Cancel

ISA Edit Regular Premiums

Edit regular payment instruction(s)

ISA STOCKS & SHARES

Payments in

Financial advice

Did you give financial advice?

- (•) Yes
- ( ) No

£16,478.00
Used allowance

£3,522.00
Unused allowance

ISA allowance 2025/2026

Regular payment

- [ ] None
- [x] Client
- [ ] Third-party

Client

Regular payment: £ 1,550

Payment frequency: Monthly

Next pay date: 01/09/2025

Continue: Until date

Last collection date: 01/04/2026

- Payments in
- Adviser charges
- Investment selection
- Review
- Documents / declaration
- Confirmation

ISA Withdrawals

Payment in | **Withdrawals** | Charges | Product information

Active instructions

Current regular withdrawal instructions

Amount	Frequency	Payer	Next withdrawal
£1,000.00	Monthly		10/09/2025

Expected single withdrawal

No single withdrawal(s) currently set up for this client

ISA Edit Withdrawals

Summary Investments Performance Insights **Transactions** Activity Documents Roles ESG

Please note that only 1 account can be selected at a time on this page.

Select account

Pending transactions ›

Select view: ISA Stocks & Shares 004

Transactions: Payments / withdrawals

Transaction type: All

Payment frequency: All

Type	Products	Frequency	Method	Date created	Amount	Instruction	Status	Entry ID#	Plan manager	Actions	Narration
Deposit	ISA Stocks & Shares	N/A	Cheque	04/06/2019	£20,000.00	One-Off	Cancelled	7228645	-	Match History	
Withdrawal Instruction(£)	ISA Stocks & Shares	Monthly	BACS	10/07/2024	£1,000.00	Regular Withdrawal	Authorised	1873000		Summary Edit Cancel	Withdrawal for Client

SIPP Detail

Plan Value

Description	Not In Drawdown	In Drawdown	Total (£)
Benefit Value (£)	£280,545.76	£304,126.13	£584,671.89

Plan Details

Selected Retirement Date	16/09/2031
Selected Retirement Age	74
Beneficiary Case	No
Next Statement Date	07/10/2025
Tax Free Lump Sum Available	£70,061.77
Hold Execution of Orders For SIPP	No

The Tax Free Lump Sum figure is an approximate value and may be subject to change

Drawdown Details

Drawdown type	Flexible
Current Income	£3,000.00
Income Frequency	Monthly

Tax Details

Tax Code	47L
Tax Regime	UK, not Welsh/Scottish tax payer

SIPP Edit Regular Withdrawals

SIPP drawdown forms

You can email:

nontelephony.drawdown@aberdeenplc.com

For any new drawdown requests, please complete the WRAP402 form (PDF) and follow the next steps.

To stop or amend existing income, please complete the WRAP429 form (PDF).

Both forms must be uploaded onto the Wrap Platform document library and an email sent to nontelephony.drawdown@aberdeenplc.com.

More help with Wrap SIPP Drawdown

Alter or Stop existing payments

Drawdown

For financial adviser use only.

- To **ALTER** or **STOP** existing payments – Use this form.
- To add **NEW** payments use the Wrap402 drawdown form available on the **Platform Contact Online webpage** under Wrap SIPP Drawdown.
- Adding bank details? – Please use the process outlined on the **Platform Contact Online webpage** under Bank Details.

Instructions

1. Complete the relevant parts of table below.
2. Either upload this form to the document library and let us know it has been uploaded via email or email directly. Email address is **NonTelephony.Drawdown@abrdn.com**

Plan Number	**WP**			
OR				
Plan Number	**D**			
Client Surname				
Taxable Income (GROSS)	£	(Enter '0' to stop payment)	monthly	per annum
Tax Free Cash	£	(Enter '0' to stop payment)	monthly	per annum
From date (DD/MM/YYYY)		Quote required?	Yes	No

Add comments below

3. Please ensure you have stopped or amended sells on the Platform as appropriate.

For information on the risks and how drawdown works, please refer to the key features document **(WRAPSLSIP17)** and the terms & conditions booklet **(WRAPSIP62)**.

Money In

Summary | Investments | Performance | Insights | Transactions | Activity | Documents | Roles | ESG

Select view: Portfolio view

Transactions: Cash

Date: Since account opening

From 21 November 2014 until 12 August 2025

Transaction type: Capital In

MPS model: Please select

Date	Product	Cash transaction	Transaction type	Money in	Money out	Balance	Capital In/Out	Detail
28/01/2025	Offshore Bond	Payment In - Single	Capital In	£100,000.00		£0.00	Yes	
17/01/2025	ISA Stocks & Shares	Deposit via direct credit	Capital In	£20,000.00		£0.00	Yes	
16/01/2025	SIPP	Payment In - Single	Capital In	£3,600.00		£0.00	Yes	

Money Out

Summary Investments Performance Insights **Transactions** Activity Documents Roles ESG

Select view: Portfolio view

Transactions: Cash

Date: Since account opening

From 21 November 2014 until 12 August 2025

Transaction type: Capital Out

MPS model: Please select

Date	Product	Cash transaction	Transaction type	Money in	Money out	Balance	Capital In/Out	Detail
25/07/2025	SIPP	Payment Out - Tax Free Lump Sum	Capital Out		£-35,000.00	£0.00	Yes	
04/02/2025	SIPP	Payment Out - Tax Free Lump Sum	Capital Out		£-10,000.00	£0.00	Yes	
31/03/2024	SIPP	Payment Out - Tax Free Lump Sum	Capital Out		£-30,000.00	£0.00	Yes	
29/03/2023	SIPP	Payment Out - Tax Free Lump Sum	Capital Out		£-20,000.00	£0.00	Yes	
30/07/2022	SIPP	Payment Out - Tax Free Lump Sum	Capital Out		£-20,000.00	£0.00	Yes	
07/10/2011	SIPP	Payment Out - Tax Free Lump Sum	Capital Out		£-20,000.00	£0.00	Yes	

Money Out

Summary | Investments | Performance | Insights | **Transactions** | Activity | Documents | Roles | ESG

Select view: Portfolio view

Transactions: Cash

Date: Since account opening

From 21 November 2014 until 12 August 2025

Transaction type: Withdrawal

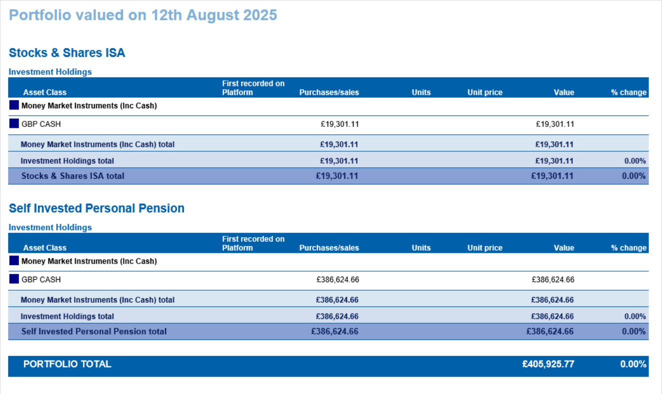
MPS model: Please select

Date	Product	Cash transaction	Transaction type	Money in	Money out	Balance	Capital In/Out	Detail
28/07/2025	SIPP	Payment Out - Income Before Tax	Withdrawal		£-430.39	£0.00	Yes	
28/07/2025	SIPP	Payment Out - Income Before Tax	Withdrawal		£-395.51	£0.00	Yes	
28/07/2025	SIPP	Payment Out - Income Before Tax	Withdrawal		£-611.69	£0.00	Yes	
28/07/2025	SIPP	Payment Out - Income Before Tax	Withdrawal		£-1,143.34	£0.00	Yes	
28/07/2025	SIPP	Payment Out - Income Before Tax	Withdrawal		£-419.07	£0.00	Yes	

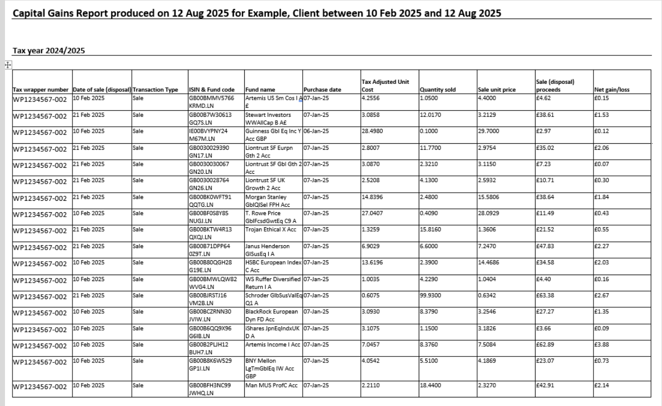
Client Reporting

ESG Report

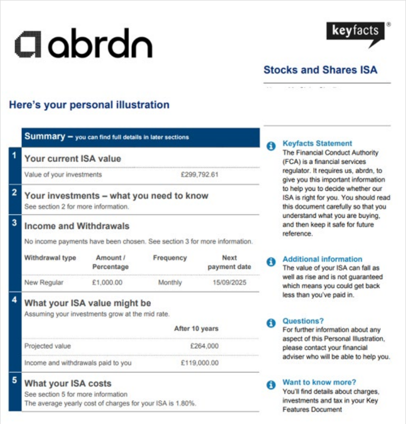
Client Valuation



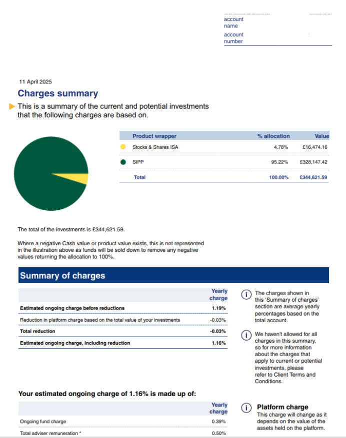
Capital Gains Report



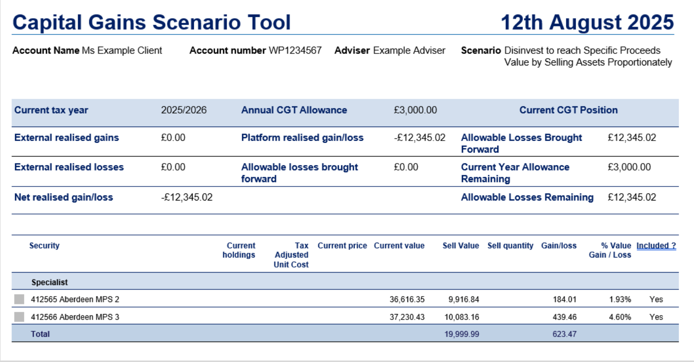
What if illustrations



Charges Summary



Capital Gains Scenario Planning



Client Portfolio Report

Setup

Select report date(s)

Since account opening ▾ From 21 November 2014 until 12 August 2025

Report view

◉ Total Portfolio ○ Product View

Format

◉ PDF ○ Word

Looking for other reports?

To request other reports such as Capital Gain Report, Investment Transactions, Statements, go to other client reports.

Looking for an ESG report?

To request an ESG report, go to ESG Hub.

Preferences

Calculation basis

◉ Simple return ○ Internal rate of return

Valuation & performance detail

Include fund breakdown

☑ Valuation

☑ Performance

◉ Product ○ Asset

○ Tier 1 ○ Tier 2 ◉ No tiers

○ MPS Summary ◉ MPS Detail

Client Portfolio Report

Contents

Include in report

Report introduction On

This will show report cover page, contents and commentary

- [x] Include cover page with firm logo
- [x] Include contents page
- [ ] Add commentary
- [ ] Upload image

Account details On

This will show a summary of your product instructions

Snapshot On

This will show a summary of the headline figures from the portfolio

Valuation On

This will show a summary of the portfolio valuation

Performance On

This will show a summary of the portfolio opening and closing values, money movements, and monetary and percentage change. It also includes a range of performance related graphs

Graphs

- [x] Valuation and money movements
- [x] Return performance

Insights On

This will show where the portfolio investments are held

- [x] Geographic allocation
- [x] Asset class allocation
- [x] Sector allocation

Transactions On

This will show a summary of the portfolio money paid in, money taken c
and charges

- [x] Summary
- [x] Money in
- [x] Money out
- [x] Charges

Client Portfolio Report

Snapshot

Account name	Account number	Account type
John Greenwood	WP1500000	Individual

Porfolio summary from 30/04/2019 to 01/05/2020

This is a summary of the headline figures from your portfolio.

Opening value: **£193,501.75** Closing value: **£218,962.39**

£ Opening value	£193,501.75
Money in	+ £19,864.26
Money out	- £33,607.98
£ Closing value	£218,962.39

Change in value **+£5,596.39** (Since inception +£78,955.01)

Return **+2.62%** (Since inception +14.98%)

The return % has been calculated using the Simple Return basis

Product information

Personal Portfolio Account number: WP1500000-02

Opening value: £124,685.47 Closing value: £107,432.89

Money in	Money out	Account transfers
£1,964.26	- £600.00	-£20,522.59

ISA Account number: WP1500000-04

Opening value: £51,049.63 Closing value: £78,377.99

Money in	Money out	Account transfers
£6,000.00	-	-£20,000.00

SIPP Account number: WP1500000-03

Opening value: £17,756.45 Closing value: £33,065.26

Money in	Money out	Account transfers
£12,000.00	- £2,400.00	-

Wrap Cash Account number: WP1500000-01

Opening value: £10.19 Closing value: £86.25

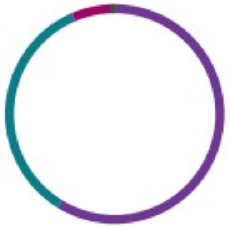
Money in	Money out	Account transfers
-	-	£522.59

£ Valuation

Summary as at 01/05/2020

This is a summary of your portfolio and investment valuation.

Portfolio value as at 1st May 2020 **£218,962.39**



Product	Account number	Allocation	Value
Personal Portfolio	WP1500000-002	62.02%	£107,432.89
ISA Stocks & Shares	WP1500000-003	31.33%	£78,377.99
SIPP	WP1500000-004	6.63%	£33,065.26
Wrap cash	WP1500000-001	0.04%	£86.25
		100.00%	**£218,962.39**

Valuation detail

This is a breakdown of your portfolio and investment valuation.

Personal Portfolio

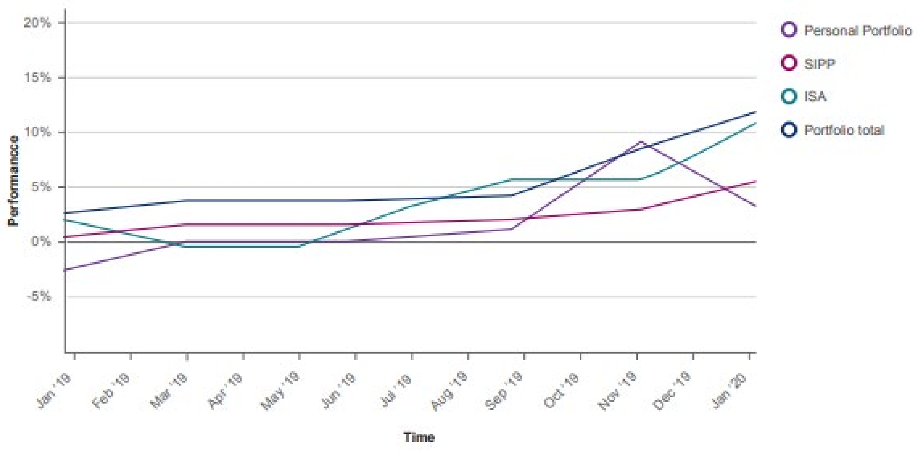
Investment	Allocation	Quantity	Unit price	Market value
Multi Asset - Up to 60% Shares				
SEI CORE STR WLTH A GBP	74.90%	42,020.3401	1.9010	£84,315.05
Multi Asset - Up to 60% Shares	74.90%			£84,315.05
Absolute Returns				
INVESCO PERP BGL TGTD RETRNS Y A	25.10%	20,320.1002	1.1002	£23,117.84
	25.10%			
Personal Portfolio total	**100.00%**			**£107,432.89**

Client Portfolio Report

Performance

Return Performance from 30/04/2019 to 01/05/2020

This shows the percentage return of your portfolio and products plotted over time.

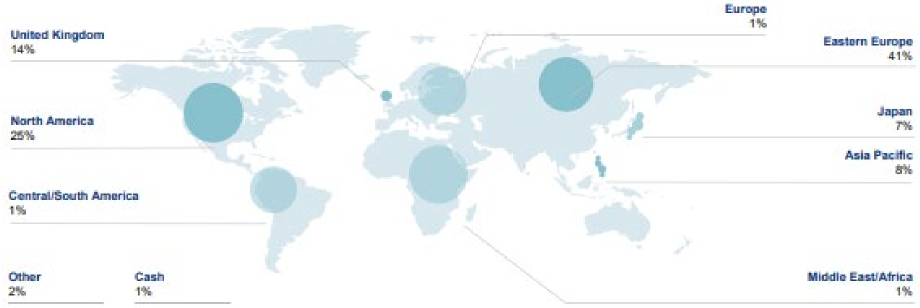


Product	Opening return	Closing return	Change
PP	4.20%	7.34%	3.14%
SIPP	0.95%	5.90%	4.95%
ISA S&S	4.15%	5.72%	1.57%
Portfolio total	**-0.99%**	**1.61%**	**2.62%**

Insights

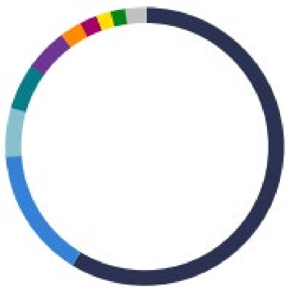
Geographic allocation as at 01/05/2020

This shows the geographic location of your portfolio investments.



Asset class allocation as at 01/05/2020

This shows a breakdown of your portfolio investments based on asset class: securities with similar markets and regulations.



Asset class	Allocation
UK Government Bonds	60.52%
Global Corporate Fixed Interest	12.56%
US Equities	5.71%
UK Equities	4.73%
Globel Index Linked	4.35%
UK Property	2.80%
Asia Pacific Equities	2.00%
Japanese Equities	1.85%
European Equities	1.81%
Other	3.67%

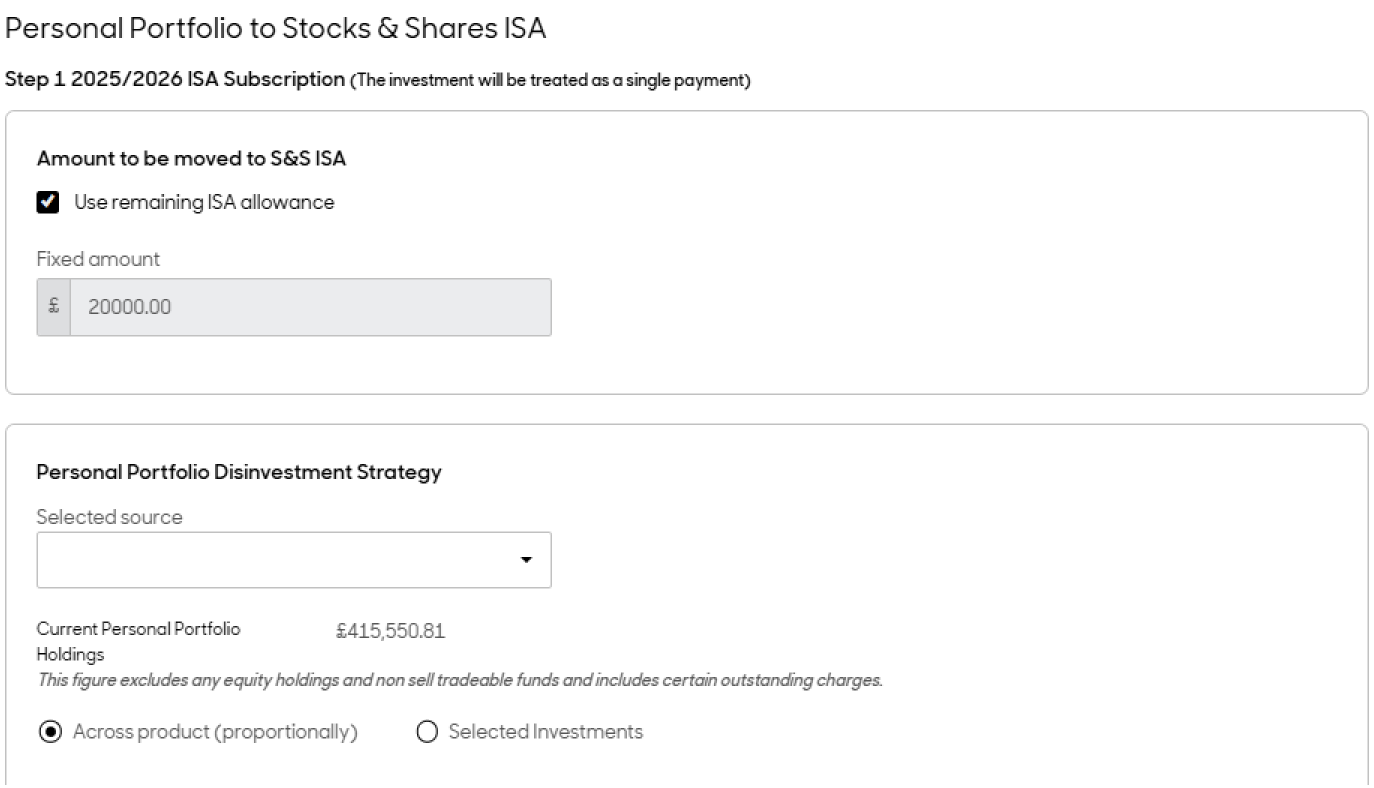
Client review

Actions & follow up

Personal Portfolio to ISA

One simple step:

Move money from your Personal Portfolio to your ISA using the PP to ISA tool.



Personal Portfolio to SIPP

Step 1.

Withdraw Personal Portfolio assets to the Cash Account.

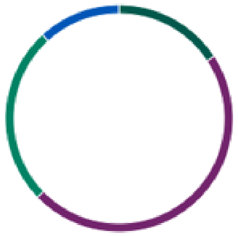
Step 2.

Top up SIPP from Cash Account using Single Payment.

Summary | Investments | Performance | Insights | Transactions | Activity | Documents | Roles | ESG

12/08/2025

Create client portfolio report



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Personal Portfolio		11.77%	+£2,421.15	£74,801.34	...
Cash Account		0.00%	-£4,640.03	£0.00	...
Total		100.00%	+£11,066.31	£635,784.55	

- Single payment ›
- Add regular payment ›
- Buy ›
- Sell ›
- Switch ›
- Withdraw ›
- Launch 'What if' Tool ›
- Launch 'No change' Tool ›

	Cash Account	Personal Portfolio 002	SIPP	Past Year ISA Stocks & Shares	Offshore Bond	New 2025/26 ISA Stocks & Shares	New 2025/26 ISA Cash
Current Value	0.00	75,061.93	162,406.65	299,792.61	100,730.52	0.00	0.00
Tick box to open a Wrapper	✔	✔	✔	✔	✔	☐	☐

Single Payments

Payment 1 - Single £1,000.00

– ☐ Notify when funds received We will issue an email and create an entry in the To-Do tab once the cash is received and matched	0	0	1000 All amounts should be entered gross	-	0 Minimum premium of £200 per segment	-	-

Source: Individual

Method: Cash Account

Managing bank accounts

Client details

- Personal details
- Account details
- Bank Details
- MIFIR decision makers
- Suspended Activity
- Capital Gains Settings
- Interested Parties

Direct Debit Instruction:
Yes

Nominated account for withdrawals:
Yes

DDI Received:
Yes

Direct Debit Set Up:
Complete

Source of Mandate:
Paper

Verification of account received:
Yes

Add/Verify Bank Account Details

Wrap/Fundzone Account

For financial adviser use only.

Wrap/Fundzone Account Number	
Is the bank account	☐ Joint ☐ Individual ☐ Employer ☐ Partner ☐ Third Party
Account Name	
Account Name should not exceed 36 characters	
Account Number	Sort code
Is the account to be used for	☐ **Direct Debits** If we have not already received a Direct Debit Mandate, please upload to the client's document library and notify **wrap_servicing@abrdn.com** ☐ **Withdrawals** (not available unless wrap/fundzone account holder is named on bank account)

Verification of account

I confirm the bank verification received is sufficient to demonstrate my client's ownership of this bank account and was received at a direct one to one meeting; I am satisfied that this is not a fraudulent request in any way.

I acknowledge that abrdn reserve the right to obtain sight of the documentation used to verify this account at any time in the future.

Adviser's name	Adviser's name required
Date (DD/MM/YYYY)	

The form does not need a wet signature; simply type the adviser's name. Upload the form to the client document library. Notify us that a form has been submitted by sending an email to **NonTelephony.BankChangeAuthorisation@abrdn.com** and include the account WP number, date and time of submission.

There is no guarantee that any email you send will be received or will not have been tampered with. You should not send personal details by email.

Family Linking

Summary of charges

	Yearly charge
Estimated ongoing charge before reductions	**1.86%**
Reduction in platform charge for customers of Wingate Financial Planning	-0.01%
Reduction in product administration charge for customers of Wingate Financial Planning	-0.01%
Reduction in platform charge based on the total value of your investments	-0.07%
Reduction in platform charge based on the total value of your family terms	-0.08%
Total reduction	**-0.17%**
Estimated ongoing charge, including reduction	**1.69%**

The charges shown in this 'Summary of charges' section are average yearly percentages based on the total account.

We haven't allowed for all charges in this summary, so for more information about the charges that apply to current or potential investments, please refer to Client Terms and Conditions.

Family terms have been included in the reduction of platform charge.

Are my client's family linked for charges?

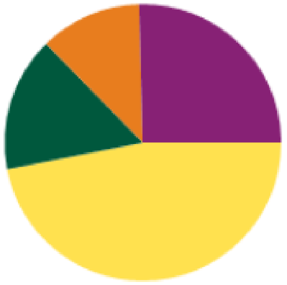
Users should email **wrap_servicing@aberdeenplc.com**

- Client names.
- Wrap numbers.
- Client relationship.
- Value of accounts.

13 June 2025

Charges summary

This is a summary of the current and potential investments that the following charges are based on.



Product wrapper	% allocation	Value
Stocks & Shares ISA	46.90%	£291,531.27
International Portfolio Bond	15.77%	£98,006.36
Personal Portfolio	11.89%	£73,903.16
SIPP	25.44%	£158,196.70
Total	**100.00%**	**£621,637.49**

The total of the investments is £621,637.49.

Where a negative Cash value or product value exists, this is not represented in the illustration above as funds will be sold down to remove any negative values returning the allocation to 100%.

Summary of charges

	Yearly charge
Estimated ongoing charge before reductions	**1.86%**
Reduction in platform charge for customers of Wingate Financial Planning	-0.01%
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Family terms have been included in the reduction of platform charge.

Your estimated ongoing charge of 1.69% is made up of:

	Yearly charge
Ongoing fund charge	0.60%

Platform charge
This charge will change as it depends on the value of the assets held on the platform.

Drawdown Price Lock

Platform charge

Lower Band (£)	Upper Band (£)	SIPP (%)	Offshore Bond (%)	Onshore Bond (%)	Cash ISA (%)	ISA Stocks And Shares (%)	Personal Portfolio (%)	Cash Account (%)
0.00	249,999.99	0.146	0.300	0.300	0.300	0.300	0.300	0.300
250,000.00	499,999.99	0.146	0.200	0.200	0.200	0.200	0.200	0.200
500,000.00	999,999.99	0.146	0.100	0.100	0.100	0.100	0.100	0.100
1,000,000.00		0.146	0.100	0.100	0.080	0.080	0.080	0.080

Charges

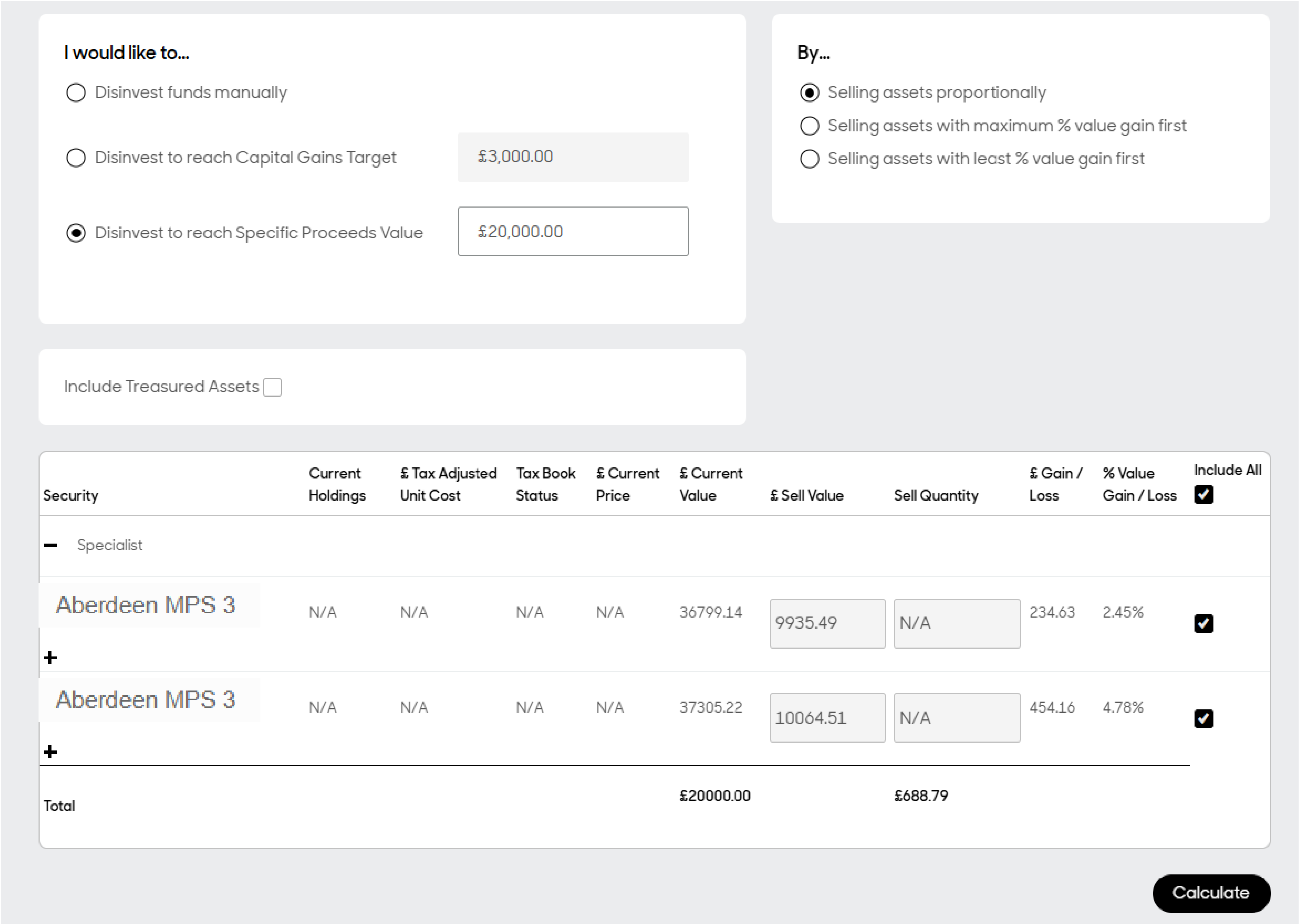
- Maintain adviser charging
- Adviser payments
- Client charges
- Charge schedules

Is my client planning any SIPP withdrawals?

Clients with the lock applied will see fixed percentage SIPP terms can be seen within a client record via Dynamic Menu > Charges > Charge Schedule.

The SIPP terms will now show as the same percentage across all tiers.

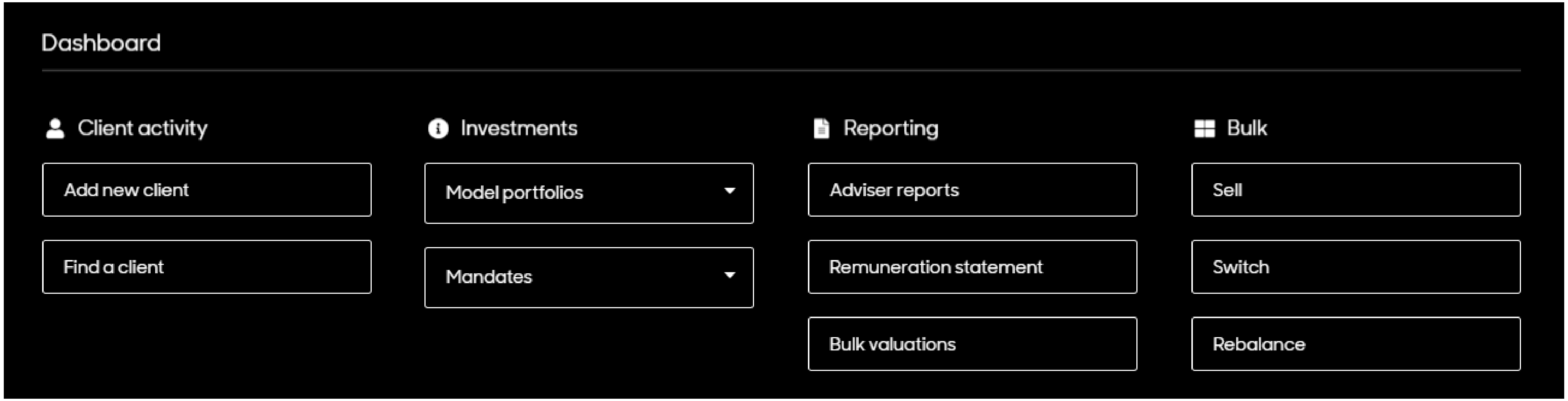
Capital Gains Scenario tool



Business Management

Adviser Reporting & integrations

Adviser Reporting



Customer Terms Report

Shows which clients (if any) are on non-standard platform and product charge terms

Income and Withdrawal Report

Shows all active regular instructions for ISA, Personal Portfolio and SIPP.

Total Holdings Report

Allows you to retrieve aggregate holdings information, either by adviser, by product, by fund, by date, by client, or by any combination of these criteria.

SIPP Detail Report

Shows you information from the SIPP Detail screen for all clients. It also shows the level of SIPP Cash in monetary and percentage, current income being taken and frequency. This report is available 24 hours after being requested.

Cash Balance Report

Shows the value of the total portfolio along with the liquid cash value in both monetary and percentage terms. This is given for each of the products that each client holds and helps you to ensure there is sufficient cash allocated for charges.

Operating in your integrated world

aberdeen

DYNAMIC PLANNER

Intelliflo

ORIGO

FASTRAK™

TIME4ADVICE

focus:solutions

moneyinfo

iress

Key things to remember:

Wealth of client reporting

Client Portfolio Report

- ✓ Snapshot for short performance valuations.
- ✓ Longer reporting with more detail around the underlying investments.

ESG report

- ✓ Specific insights for clients with an interest in Ethical, Social, Governance investment

Drawdown Price Lock

This calculator demonstrates how the Drawdown Price Lock works and lets you see when clients may benefit from locking in their Wrap SIPP charge.

Drawdown Price Lock Calculator for Advisers | Aberdeen

Download suitability guides

Remember to download the due diligence & suitability guides to support your client recommendations:

- ✓ Welcome to Aberdeen.
- ✓ Helping you manage your wealth.
- ✓ Wrap Due Diligence.
- ✓ Investor Protection guide.
- ✓ AKG Rating report.

Back-office integrations

Email **wrap_servicing@aberdeenplc.com** to turn on automated bulk valuations with your back-office provider.

See **www.aberdeenadviser.com/en-gb/help-centre/adviser-systems-integrations** for more information on which providers are compatible.

Disclaimer

Laws and tax rules can change. The value of tax benefits will depend upon individual circumstances.

All information presented in this webinar is correct as at August 2025.

Questions