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# Elevate help guide Linking accounts

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# By linking accounts for family members, the Elevate Portfolio Charge is based on the combined value of investments, which may reduce platform charges.

## What you will see

The screenshot shows the 'Link Accounts' page in a web application. At the top, there is a navigation menu with 'Existing Clients' selected. Below it, a sub-menu shows 'Link Accounts' as the active option. The main content area is titled 'Account Search' and contains several fields: 'Advisers' (dropdown menu with 'Anon Adviser 2181'), 'Account Type' (dropdown menu with 'Individual Accounts'), 'Link for:' (radio buttons for 'Viewing Purposes' and 'Charging & Viewing Purposes'), 'Account No.' (text input with 'EL1146504'), and 'Account Name' (text input). A 'Search' button is located at the bottom right of the search form. Below the search form is a table with columns: 'Account No.', 'Client Name', 'Fee Structure', 'Relationship', and 'Select'. The table contains one row with the following data: 'EL1146504', 'Anon Client 127014', 'Explicit(UnBundled)', 'Mother', and a checked checkbox. Five numbered callouts (1-5) point to specific elements: 1. 'Link Accounts' in the sub-menu; 2. 'Advisers' dropdown; 3. 'Account Type' dropdown; 4. 'Charging & Viewing Purposes' radio button; 5. 'Search' button.

## What you will need to do

### To link individual (unlinked) accounts:

1. Go to **Existing Clients > Link Accounts**.
2. In **Account Search**, select the adviser who manages the account from the drop down list.
3. In **Account Type**, select **Individual Accounts**.
4. Select either **Viewing Purposes** or **Charging & Viewing Purposes** as appropriate.
5. Enter the first **Account Number** and/or **Account Name** that you want to add to in a new chain of linked accounts, then click **Search**.

## Notes

**Before you start:** You can only link accounts that your Elevate permission settings will normally allow you to transact on.

4. **Viewing** means accounts are only linked in-order to provide a consolidated view of the accounts - there is no impact on charges.

**Charging** means the combined value of accounts, excluding any cash, will be used to calculate the Elevate Portfolio Charge potentially reducing the charge.

5. Alternatively you can just click **Search** to display a list of all accounts then select relevant ones.

# By linking accounts for family members, the Elevate Portfolio Charge is based on the combined value of investments, which may reduce platform charges – cont.

## What you will see

The screenshot shows a web interface for linking accounts. At the top is the 'Account Search' section with fields for Advisers (Anon Adviser 2181), Account Type (Individual Accounts), Link for (Charging & Viewing Purposes selected), Account No. (EL1146504), and Account Name. Below this is a table with columns: Account No., Client Name, Fee Structure, Relationship, and Select. The first row shows EL1146504, Anon Client 127014, Explicit(UnBundled), Mother, and a checked checkbox. Below the table is the 'Accounts To Link' section with fields for Account No. and Account Name, and buttons for Save and Clear. At the bottom, there is a list of three accounts: EL1158894, EL1187422, and EL1146504, each with a Remove button. Callout 6 points to the Relationship dropdown in the table. Callout 8 points to the Account Name field in the 'Accounts To Link' section. Callout 9 points to the Save button.

## What you will need to do

6. When the account shows below, select the **Relationship** from the drop down list, then tick **Select**.
7. Select the next account to be linked by again searching for the **Account number** and/or **Account Name**, repeating steps 5 and 6.
8. Once all the accounts you want to link together have been selected, go to the right side of the screen under **Accounts To Link** and give a name for the consolidated series of accounts.
9. Click **Save** to complete.

## Notes

6. This account will be added to the right hand side of the screen.
7. Repeat to add further accounts. Each time you select an account it will be added to the right hand side of the screen.
9. Once you have submitted the changes a new account number will be generated providing you with a single view of the combined assets. You can still add new accounts later to the chain of linked accounts or remove them if necessary.

# By linking accounts for family members, the Elevate Portfolio Charge is based on the combined value of investments, which may reduce platform charges – cont.

## What you will see

The screenshot shows the 'Link Accounts' page in a web application. The navigation bar includes 'Existing Clients' and 'Link Accounts'. The 'Account Search' section contains several fields: 'Advisers' (dropdown menu), 'Account Type' (dropdown menu), 'Link for:' (radio buttons for 'Viewing Purposes' and 'Charging & Viewing Purposes'), 'Account No.' (text input), and 'Account Name' (text input with a 'Search' button). A table below shows a list of accounts with columns for 'Account No.', 'Client Name', 'Fee Structure', 'Relationship', and 'Select'. The first row contains the values: 'EL1147585', 'Anon Client 128076', 'Explicit(Unbundled)', and an empty 'Select' cell. Five numbered callouts (1-5) point to specific elements: 1. 'Link Accounts' in the navigation bar; 2. 'Advisers' dropdown menu; 3. 'Account Type' dropdown menu; 4. 'Charging & Viewing Purposes' radio button; 5. 'Search' button.

## What you will need to do

### To link a new account to an existing chain of linked accounts:

1. Go to **Existing Clients > Link Accounts**.
2. In **Account Search**, select the adviser who manages the account from the drop down list.
3. In **Account Type**, select **Linked Accounts**.
4. Select either **Viewing Purposes** or **Charging & Viewing Purposes** as appropriate.
5. Enter the **Account number** and/or **Account Name** of the existing consolidated account, then click **Search**.

## Notes

You can start by searching for the existing chain of linked accounts then search and add new ones to it.

5. Alternatively you can just click **Search** to display a list of any linked accounts already set up, then select the one you want to add to.

# By linking accounts for family members, the Elevate Portfolio Charge is based on the combined value of investments, which may reduce platform charges – cont.

## What you will see

Account No.	Client Name	Fee Structure	Relationship	Select
EL1147585	Anon Client 128076	Explicit(Unbundled)		

  

**Account Search**

**Advisers**

**Account Type**

**Link for:**  
 Viewing Purposes  
 Charging & Viewing Purposes

**Account No.**

**Account Name**

  

Account No.	Client Name	Fee Structure	Relationship	Select
EL1146504	Anon Client 127014	Explicit(UnBundled)	Mother	<input checked="" type="checkbox"/>

## What you will need to do

- When the account shows below, select the **Account Number**.  
You then need to search for the individual (unlinked) accounts that you want to add.
- In **Account Search** on the left side of the screen, select the adviser who manages the account if different.
- In **Account Type**, select **Individual Accounts**.
- Select either **Viewing Purposes** or **Charging & Viewing Purposes** as appropriate.
- Enter the first **Account Number** and/or **Account Name** that you want to add to the existing chain of linked accounts, then click **Search**.

## Notes

- This account will be added to the right hand side of the screen as well as all the underlying linked accounts.
- Alternatively you can just click **Search** to display a list of all individual accounts then select the each account you want to link.

# By linking accounts for family members, the Elevate Portfolio Charge is based on the combined value of investments, which may reduce platform charges – cont.

## What you will see

Account No.	Client Name	Fee Structure	Relationship	Select
EL1146504	Anon Client 127014	Explicit(UnBundled)	Mother	<input checked="" type="checkbox"/>

Accounts To Link

Account No. EL1147585

Account Name Anon Client 128076 Search

Save Clear

EL1071993 Remove

EL1143286 Remove

## What you will need to do

11. When the account shows below, select the **Relationship** from the drop down list, then tick **Select**.

Repeat steps 10 and 11 to add more accounts.

12. Once all the new accounts have been selected, go to the right side of the screen under **Accounts To Link** then click **Save** to complete.

## Notes

11. This account will be added to the right hand side of the screen along with the existing linked accounts.

## Helpful hints

A maximum of 10 accounts can be linked.

The changes you make will complete once we have authorised them. This will normally be within 24 hours.

**Viewing Purposes** means accounts are only linked in-order to provide a consolidated view of the accounts – there is no impact on charges.

**Charging & Viewing Purposes** means the combined value of accounts, excluding any cash held in the Elevate Cash Account, product cash or cash held in adviser or discretionary models, will be used to calculate the Elevate Portfolio Charge potentially reducing the charge. A consolidated view of combined accounts will also be provided.

The new account number providing you with a single view of the combined assets will be listed alphabetically in your client list. This will show as a **Consolidated** account.

### Account types that can be linked

- Individual accounts
- Joint account
- Third party accounts
- Trust accounts

### Who can be linked

- Themselves, if they have multiple accounts (including an Elevate Trust account where the individual is either the settlor or beneficiary).
- Spouse
- Co-habiting partner
- Civil partner
- Parents
- Grandparents
- Children
- Grandchildren

## Additional notes

In the case of linking grandparents with grandchildren, the parents do not have to be part of the link.

Siblings cannot link unless at least one parents is part of the linked group.

In the case of children/parents/grandchildren, there is no limit to the number of generations that may link.

Co-habiting couples must be resident at the same address which must be the address held on the platform.

The value of any account excludes cash holdings.

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

**Call us on 0345 600 2399**

Our lines are open 9am to 5pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

**Email us at [Elevate\\_Enquiries@aberdeenplc.com](mailto:Elevate_Enquiries@aberdeenplc.com)**

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