



Synaptic Comparator Setup

Quick Start Guide

Service Levels
Once setup you can change the adviser fees against each service level within the adviser fee area. You can then select the service level for your client on the contact screen. This will then be taken into account in the research to show the total solution cost for on platform and off platform options

Product	Initial (£)	Initial (%)	Regular (£ per premium per product)	Regular (% per premium per product)	No. of Chargeable Premiums	Ongoing (£pa)	Ongoing (%pa)
All Platforms	Mixed	Mixed	0	0	All	0	0.5
Variable	0	1.5	0	0	All	0	0.5
Platinum	0	1	0	0	All	0	0.5
Gold	0	2	0	0	All	0	0.5
Silver	1000	0	0	0	All	0	0.5
Bronze	1000	0	0	0	All	0	0.5
> AEGON Retirement Choices - AEG...	Mixed	Mixed	0	0	All	0	0.5
> Al Bell (Investcentre) - Al Be...	Mixed	Mixed	0	0	All	0	0.5
> Alliance Truist Savings Limited...	Mixed	Mixed	0	0	All	0	0.5
> Ascentric - Ascentric - The Wh...	Mixed	Mixed	0	0	All	0	0.5
> Ascentric - Ascentric - The Wh...	Mixed	Mixed	0	0	All	0	0.5
> Aviva - Freedom Portfolio Ran...	Mixed	Mixed	0	0	All	0	0.5
> Aviva Wrap Direct - Aviva Wra...	Mixed	Mixed	0	0	All	0	0.5
> AXA Elevate - Elevate	Mixed	Mixed	0	0	All	0	0.5
> Cofunds Ltd - Cofunds	Mixed	Mixed	0	0	All	0	0.5
> FundsNetwork - FundsNetwork	Mixed	Mixed	0	0	All	0	0.5
> FundsNetwork - FundsNetwork (N...	Mixed	Mixed	0	0	All	0	0.5
> James Hay Partnership - James ...	Mixed	Mixed	0	0	All	0	0.5
> James Hay Partnership - James ...	Mixed	Mixed	0	0	All	0	0.5
> Novia - Novia Wealth Managemen...	Mixed	Mixed	0	0	All	0	0.5
> Nucleus - Nucleus	Mixed	Mixed	0	0	All	0	0.5

Adviser Fees

All Platforms – this would be used if you have one charge for all clients and all platforms and products

Service Level – this would be used if you charge different amounts for different service levels for your clients

Per Platform – this would be used if you charge different amounts for different platforms

Off Platform – this would be used to enable Comparator to calculate the costs for off platform products

Applied Special Deals

Providers are able to set up special deals within Comparator and allocate to IFA firms via their FCA number. If any special deals have been allocated to you, these will be viewable here

Portfolio Builder

You can setup portfolios here. They can then be selected when conducting research.

TECHNICAL SUPPORT

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SALES & CUSTOMER SERVICES

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