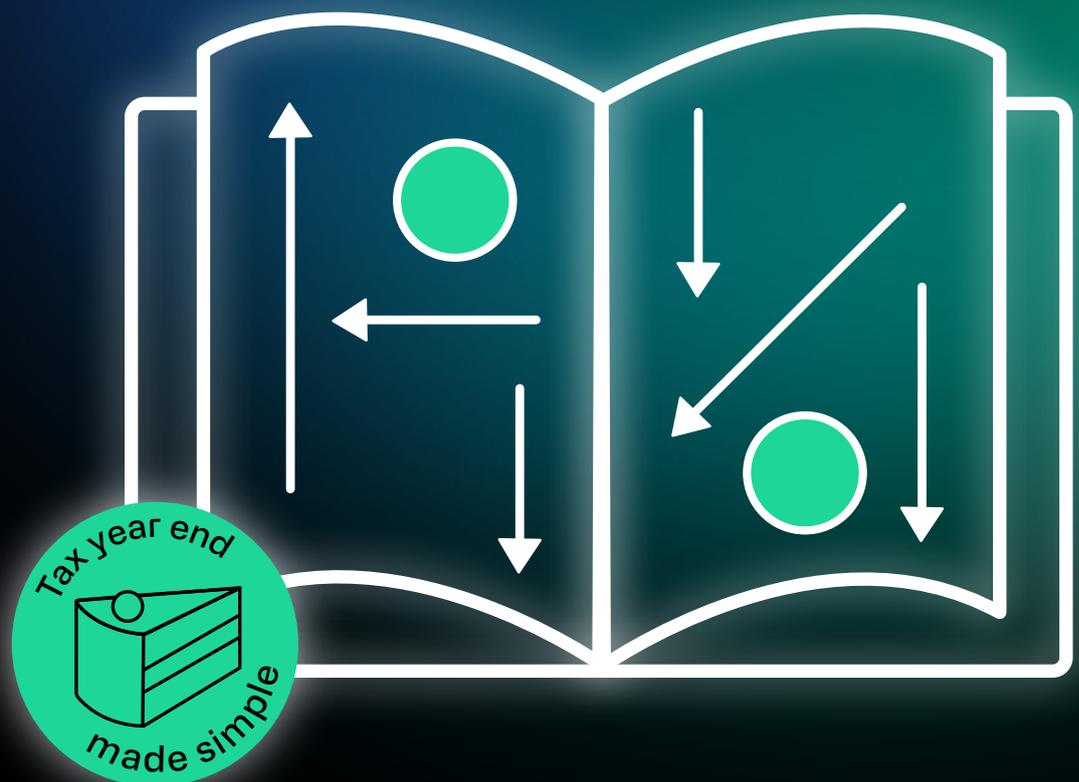


# How to complete a GIA to ISA transfer (Bed and ISA)

For adviser use only





1. Search for and select your client.
2. Once in the client record, go to the payments tab and choose ISA. You'll see a summary of the client's subscriptions – showing you how much they've used, how much is left, and any flexible replacement available.
3. Go to the GIA record and choose payments out.
4. Go to add payment out instruction.
5. The available cash balance on screen will let you know whether you'll need to place trades. You can still add the instruction and then place the trades afterwards. Remember to review any target cash settings and preferences you need in place for tax year end.
6. Follow the process, completing the amount that needs to move and the payment date (make sure it's before 5 April 2025 - so that the cash is moved in this tax year) and select the destination account.
7. **Please note:** You won't be able to see the money movement into the ISA until there is cash available and the transfer of money has completed .

**Top tip:** You can also add an additional movement of cash to cover the £20,000 subscription for next tax year. Do this by forward-dating the instruction (eg 6 April 2025) so that the second payment only moves into the ISA once the new tax year starts.

If you require this document in an alternative format please contact us.

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