

How to complete a top-up

Clear instructions,
no detours required





1 From the Adviser Zone homepage, search for the investor using their name, investor number, or wrapper ID and press 'view.'



2 On the investor summary page, select the product wrapper you want to top-up, then select 'top-up' from the tabs in the top right.

MAINTENANCE ▾ REPORTING ▾ RESEARCH TOOLS ▾

WITHDRAWAL SWITCH **TOP UP**

[Home](#) > [Mr Novia Imp Demo One \(180934\)](#) > General Investment Account (575512)

Wrapper Summary



3 You'll now see the steps to complete the top-up on the left-hand side. Some steps will show as completed as this information was entered when the wrapper was created.



4 Under step two, select the investment type and enter the amount to be invested.

1 Nickname (Optional)
No nickname set

2 Investment Types
Single
Total: £0.00
Charges:
No Regular Investment

3 Regular Withdrawals
Edit your regular withdrawals.

Investment Types

SINGLE

Single Investment(s) X

If your client wishes to invest more than their bank's electronic transfer function will allow in a single transaction, you can either split their investment amount into smaller single transactions which will be invested as they are received or enter it as one single investment below and investment will only occur once the final electronic transfer has been received. ([Click here for more information](#))

Investment amount (£)

Adviser Initial Charge

☐ None ☒ Amount ☐ Percentage

ADD ANOTHER INVESTMENT



5 Enter the details of the investment, adding any additional investments under the same type if needed.



6 Select and enter any initial adviser charges.





- 7 Proceed through the remaining steps to select the investment strategy and access documents.
- 8 Once you've finished, press 'submit' to go to the online declaration and 'proceed' to agree.

Documents

PRE-SALES ILLUSTRATION

CLIENT REPORT

GIA APPLICATION SUMMARY

PAYMENT INSTRUCTIONS

BACK

SUBMIT

SAVE

- 9 You can check progress in the notification centre section of the investor summary screen.



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

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