



5pm Withdrawals

Any additions or changes to payroll for income payments due on 1 April 2026

- Don't forget - you can send us the instruction via secure message. This includes Benefit Payment Forms, even if it's the first event.

5pm Payments In

Let us know about any changes to Direct Debits which are due to be paid into pensions on 7 April 2026

- If the change relates to a personal contribution, you can send us a secure message.
- If it relates to an employer or employee contribution, don't forget to submit a new Record of Payments Due form.

5pm New Application

New client and existing product applications

9.30am Withdrawals

Place disinvestments to be settled for income payments due on 1 April 2026

- Trades need to be received before 9:30am, as this is our trading cut off time.
- If these funds are not cleared and available, the next income payment date will be 1 May 2026.

9.30am Internal Transfers

Disinvestments to be placed for Bed and ISA and other internal payments

5pm Internal Transfers

Interspousal asset transfers for Capital Gains Tax (CGT) planning

- These can be instructed by secure message. Make sure you include parties involved, the fund and the exact number of units which are to be transferred.

Midday Payments In

Cash payments by BACS

Midday Payments In

Cash payments by CHAPS/ Faster Payments

Midday Payments In

Cheques to be received by Wealthtime Classic

- We'd appreciate it if you could send payments before midday on 2 April, where possible, to support our processes.
- Anything received before the end of the 2025/2026 tax year will be allocated for the 2025/2026 tax year. This includes cheques.
- All deposits received into the account on 5 April will be included in the 2025/2026 tax year and credited for that day. This differs from our usual process where you see credit the following working day.
- If it's a new employer or employee contribution, please submit a Record of Payments Due form and a SIPP Supplementary Contributions Application.

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

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