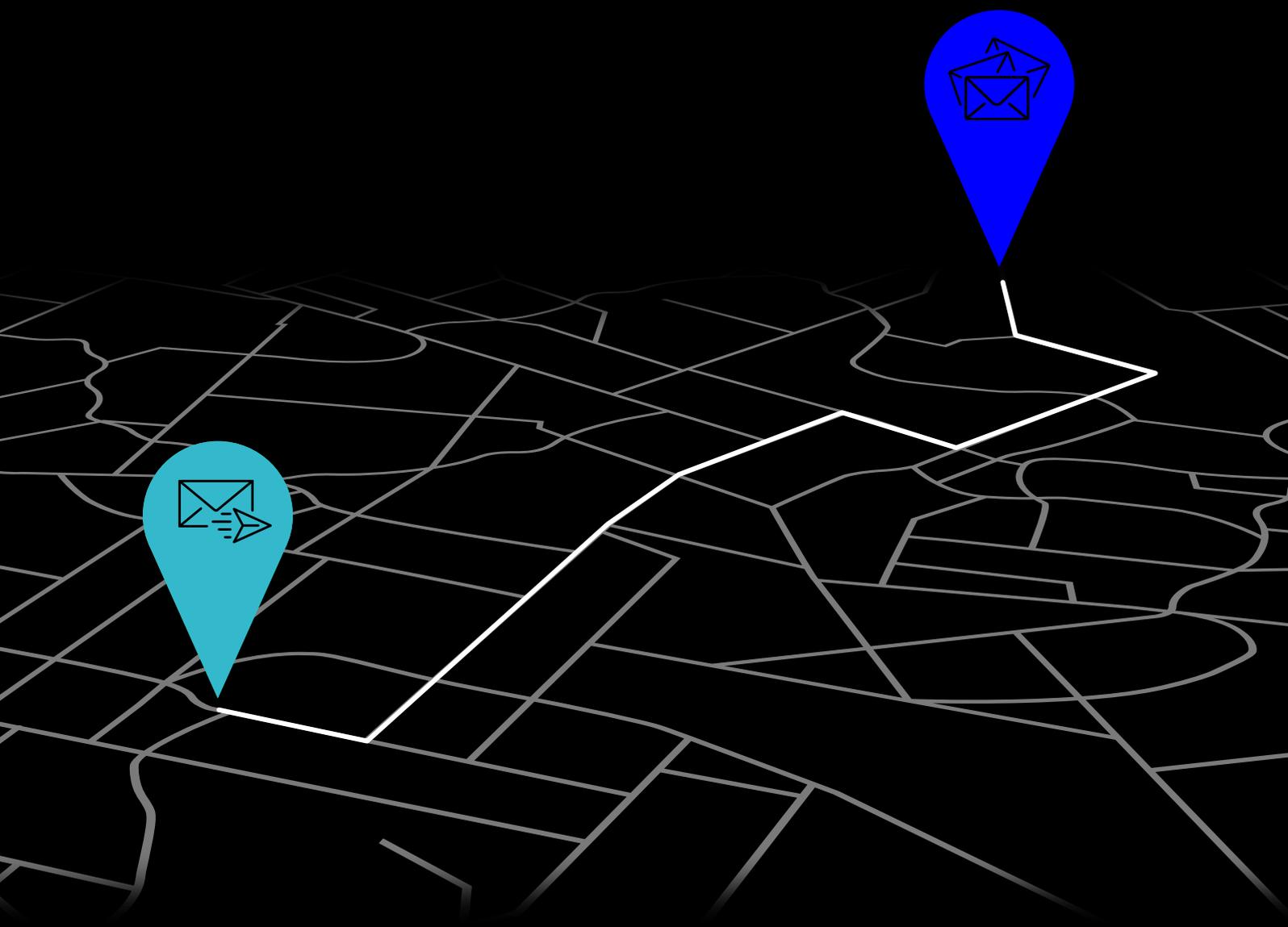


# How to run a tax year end email campaign for your clients

Clear instructions,  
no detours required





Find out how the platform supports you, as you help your clients make the most of their available ISA subscriptions. From the report you need to show available subscriptions, and find contact details, right through to completing tasks and monitoring results.

### 1. Identify the right clients

Generate your list of contacts by running the 'Remaining ISA Subscriptions in Current Tax Year report':

1. Log into the platform and go to report zone
2. Click 'reports about clients/wrappers'
3. Select 'Remaining ISA Subscriptions in Current Tax Year'. This report highlights both:
  - clients with unused ISA allowance
  - clients with a Wealthtime wrapper but no Wealthtime ISA

Remember: our ISA is flexible, so remaining allowance adjusts for withdrawals. You'll also see that the report includes columns for total GIA value and total GIA cash balance – making it easy to see what could be available to fund the ISA.

### 2. Gather client contact details

The 'Remaining ISA Subscriptions in Current Tax Year', shown in step one, includes the clients' contact details (email address and home address).

If any client details need updating, please send us a secure email.

### 3. Put together your email

At the end of this document, we've suggested some sample wording to get you started. Although you're welcome to use this with your clients, please bear in mind that we don't know your clients' individual circumstances and we are not able to provide advice.

### 4. Taking action on your clients' accounts

Once you've agreed with your clients what actions to take, follow these processes to complete the actions on the platform.



## Top up an account (either new money or transfer from GIA or another provider)

- Go to the [top up journey on the platform](#)
  - You can get there by logging in to the platform, going to transactions and selecting top up.
- Select an investor, and follow the workflow through
- You'll have the option to either contribute a single amount, a regular amount, or transfer from a GIA.

### Add a wrapper

- Go to the investor record, and click 'add wrapper'
- Select the relevant wrapper and follow the workflow through

### Carry out a switch (sell for withdrawal)

- Go to [switch process](#)
  - You can get there by logging in to the platform, going to transactions and selecting switch.
- Select an investor, and follow the workflow through

Don't forget to bear in mind the deadlines for submitting requests in time for the current tax year.

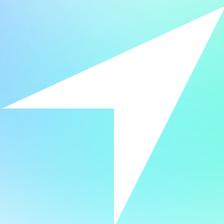
## 5. Monitor results

Keep an eye on how it's going using 'Reports about Clients/Wrappers' in Report Zone:

- Run the Remaining ISA Subscriptions in Current Tax Year report regularly to track who's contributed.
- Run the '[New Business Pipeline Report](#)' to keep an eye on money that's expected to be coming onto the platform but hasn't been received yet.

Top tip - If you're logged in as someone with Firm Reporting permissions, you can use the option in the top right corner of Report Zone, to see reports for all clients of your firm.





Please note, for the hyperlinks above to work, you need to be already logged in to the platform before you click them.

Sample wording

## Scenario one: for a client that doesn't have an ISA yet

### First email

**Subject:** Make the most of your ISA allowance before 5 April

Hello **[add your client's name]**,

As we approach the end of the tax year on Sunday 5 April, I wanted to get in touch to review your portfolio and ensure you're making the most of the investment opportunities and tax allowances available to you.

One option that's worth considering is opening an Individual Savings Account (ISA).

You can invest up to £20,000 per tax year. Bear in mind that the annual allowance resets each year and can't be carried over. This means that any unused allocation will be lost after midnight on the 5 April.

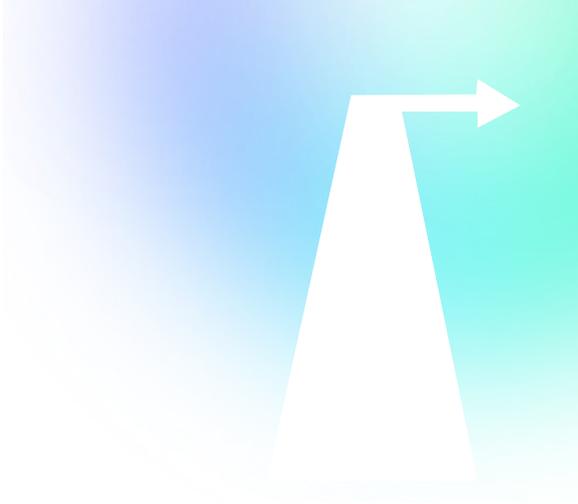
**An ISA can offer valuable benefits like:**

- **Tax-free growth**  
Any returns within an ISA are free from capital gains or income tax.
- **Flexible, efficient wealth planning**  
ISAs provide a structured way to save money, whether for short-term or long-term goals.
- **Maximising future potential**  
Investing earlier gives your money more time to grow, helping you build wealth more effectively over time.

If you would like to discuss how an ISA could help you meet your financial goals, please contact me on **[add your phone number]** or **[add your email address]**. I'd be happy to arrange a call or meeting at a time that suits you.

Please remember that the value of investments and the income from them can fall as well as rise, and you may get back less than you invest. Tax treatment depends on individual circumstances and may be subject to change in the future.





Kind regards,  
[add your name]

## Reminder email

**Subject:** A quick reminder about your remaining ISA allowance

Hello [add your client's name],

I hope you're well. I wanted to follow up on my previous email as we're now getting closer to the end of the tax year on 5 April.

You still have your £20,000 of unused ISA allowance available for this year. As a reminder, any unused allowance can't be carried forward and will reset at midnight on 5 April.

If you'd like to make use of your ISA allowance, I can help you arrange this. Or, if you don't plan to open an ISA this year, please let me know so I can update my records.

Please remember that the value of investments and the income from them can fall as well as rise, and you may get back less than you invest. Tax treatment depends on individual circumstances and may change in the future.

Kind regards,  
[add your name]



## Scenario two: For a client who has ISA but has some or all subscription remaining

### First email

**Subject:** Make the most of your ISA allowance before 5 April

Hello **[add your client's name]**,

As we approach the end of the tax year on Sunday 5 April, I wanted to remind you that you still have **[add the available ISA allowance figure – see step one for a reminder of how to do this]** of unused ISA allowance available. Because the annual ISA allowance of £20,000 resets each year and can't be carried over, any unused allocation will be lost after midnight on the 5 April.

Making the most of your ISA allocation can offer valuable benefits like:

- **Tax-free growth**  
Any returns within an ISA are free from capital gains or income tax.
- **Efficient wealth planning**  
ISAs provide a structured way to save money, whether for short-term or long-term goals.
- **Maximising future potential**

The earlier you invest, the more time your money has to grow. With an ISA, you can potentially achieve higher returns over the long term compared to traditional savings accounts, helping you build wealth more effectively.

If you would like to discuss how best to use any remaining allowance, please contact me on **[add your phone number]** or **[add your email address]**. I'd be happy to arrange a call or meeting at a time that suits you.

Please remember that the value of investments and the income from them can fall as well as rise, and you may get back less than you invest. Tax treatment depends on individual circumstances and may be subject to change in the future.

Kind regards,  
**[add your name]**





## Reminder email

**Subject:** A quick reminder about your remaining ISA allowance

Hello **[add your client's name]**,

I hope you're well. I wanted to follow up on my previous email as we're now getting closer to the end of the tax year on 5 April.

You still have **[add the available ISA allowance figure – see step one for a reminder of how to do this]** of unused ISA allowance available for this year. As a reminder, any unused allowance can't be carried forward and will reset at midnight on 5 April.

If you'd like to make use of this remaining allowance, I can help you arrange this. Or, if you don't plan to top up your ISA this year, please let me know so I can update my records.

Please remember that the value of investments and the income from them can fall as well as rise, and you may get back less than you invest. Tax treatment depends on individual circumstances and may change in the future.

Kind regards,  
**[add your name]**

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

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