



For customers

# How to top up an ISA or GIA on the Aegon Platform



# How to top up an ISA or GIA

This guide explains how to top up an ISA or general investment account (GIA) on the Aegon Platform.

It can take up to seven working days to process your top-up request.

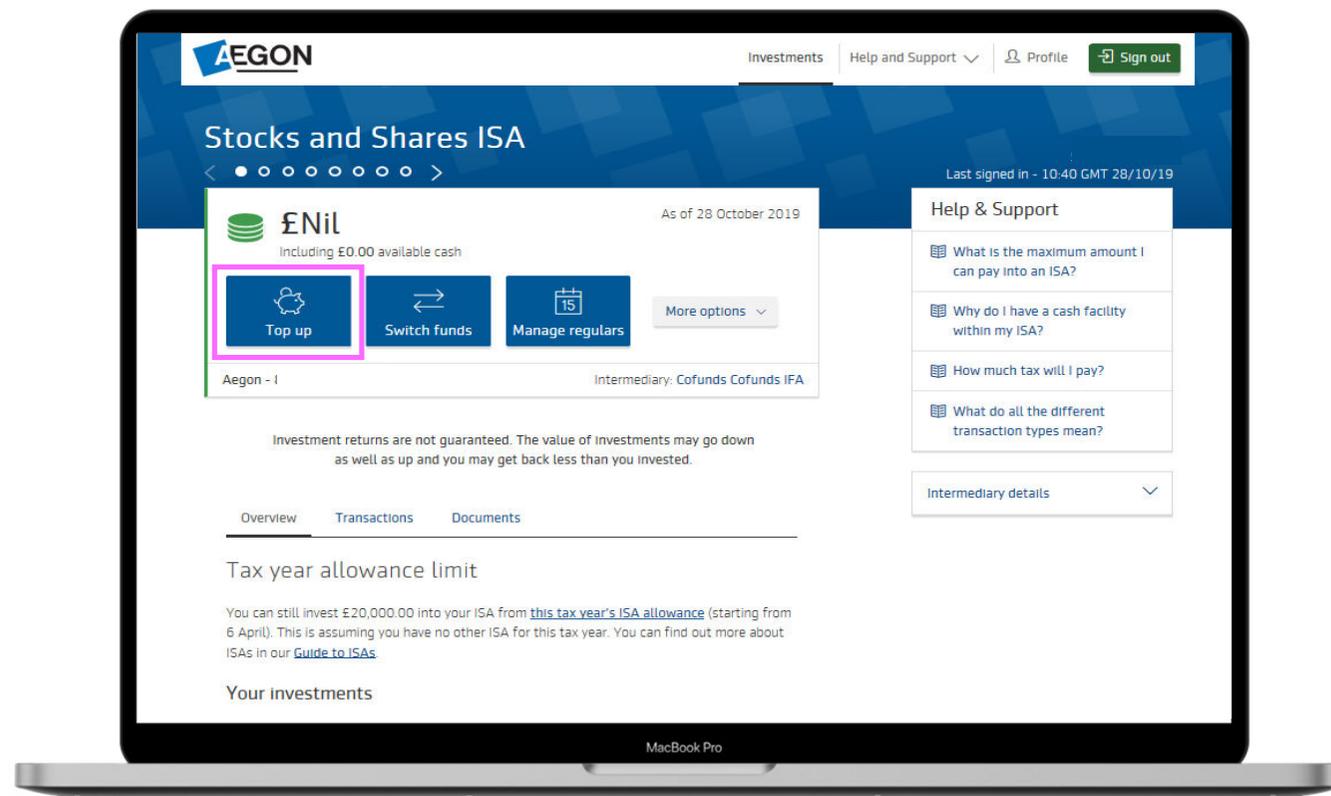
You can only complete this request online if you have transactional access.

If you have view only access to your account, you need to contact your financial adviser.



# How to top up an ISA or GIA

- 1 Sign in to your Aegon Dashboard account.
- 2 Select the product you'd like to top up.
- 3 Then select **Top up**.



### Slide 3

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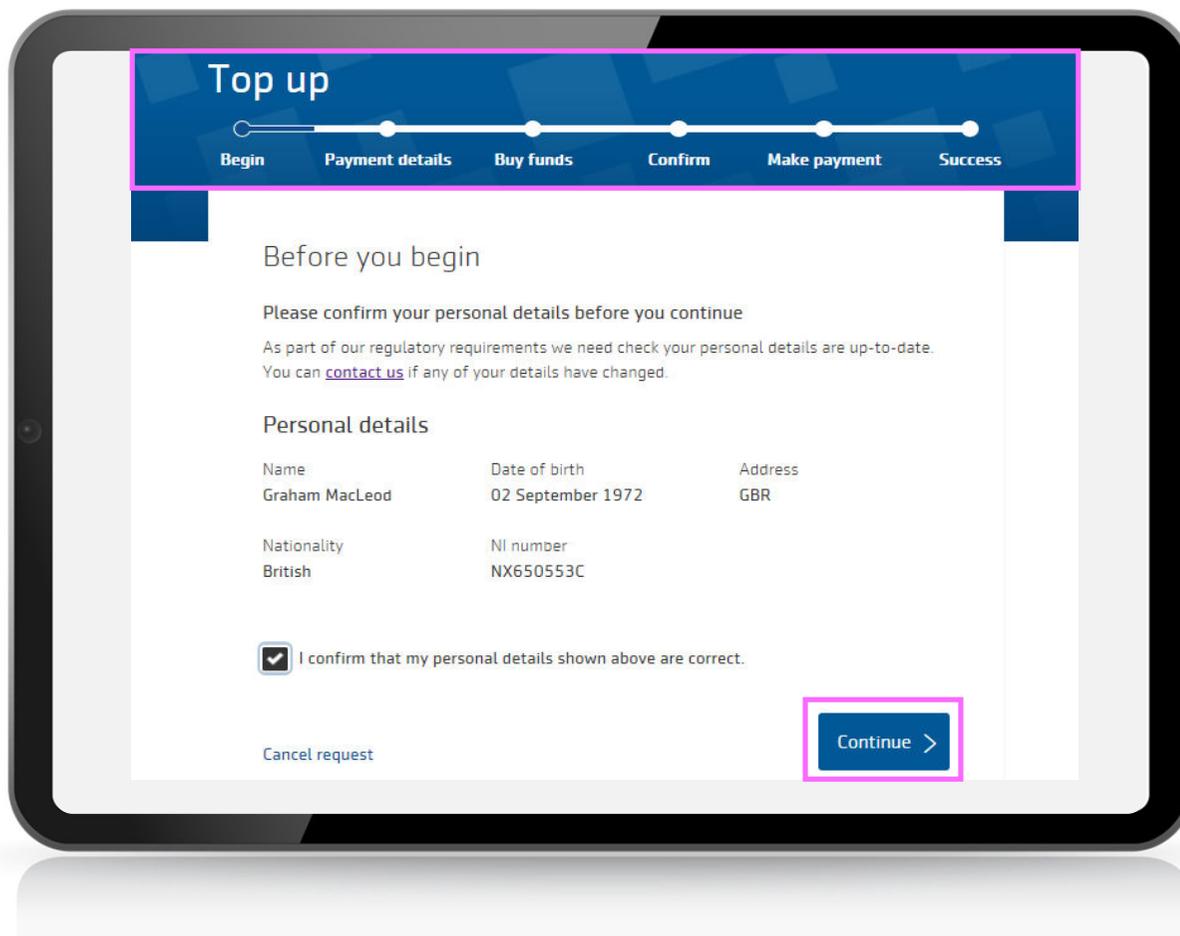
**AC0**

For next BAU review - some of the screenshot images throughout are bad quality - worth updating these to better quality images at next review.

Cameron, Amy, 2025-04-16T09:31:49.716

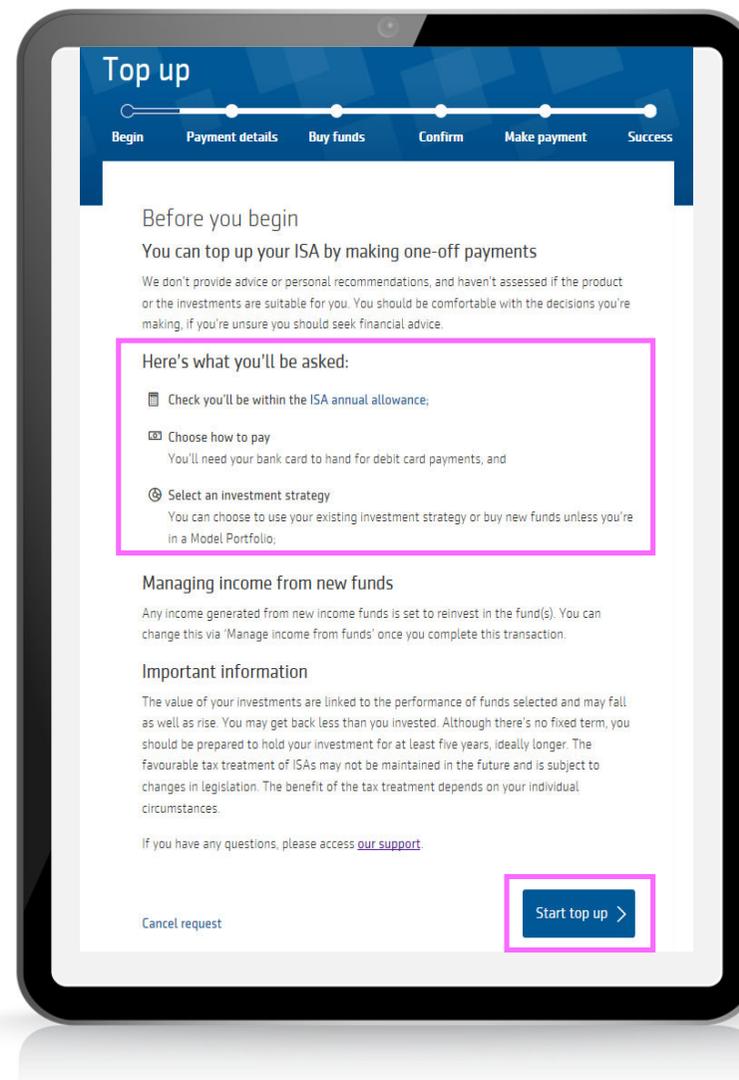
# Starting your top-up request

- 1 Along the top of the screen you can see what stage of the process you're at.
- 2 Check and confirm your personal details are correct.
- 3 Select **Continue**.



# Starting your top-up request

- 1 Before you begin, we'll set out what you need to do to complete your request.
- 2 Read over everything here and select **Start top up** to continue.



# Select your payment method

- 1 Select **Debit card, Cheque or Bank transfer**.
- 2 Enter how much you want to top up by.
- 3 Confirm the **Source of wealth** from the drop down menu options.
- 4 If you're topping up your ISA, confirm the payment falls within your ISA annual allowance.
- 5 Select **Buy funds**.

Top up

Begin Payment details Buy funds Confirm Make payment Success

Payment details

Please select a payment method.

Payment method

Debit card Cheque Bank transfer

One-off amount  
£ 20000

Source of wealth  
Salary / Bonus

To comply with financial regulations, regular payments must pass our anti-money laundering checks.

My total payments are within the ISA annual allowance  
[More about the ISA annual allowance](#)

How do you want to allocate this amount?

Choose funds to buy

Cancel request

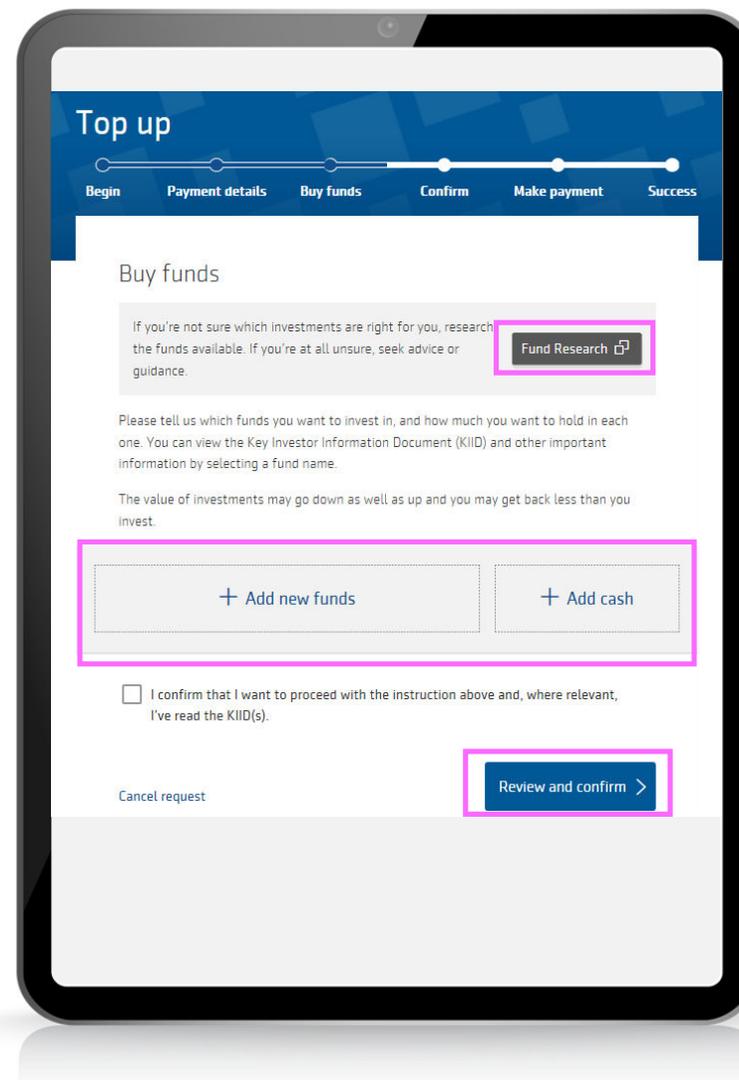
Buy funds >

# Selecting which fund(s) you want to buy

- 1 Select where you want to invest your top up.
  - If you want to invest in a fund(s) – select **Add new funds**. The following pages show you how to do this.
  - If you want to invest in cash - select **Add cash**.

If you're unsure of which fund(s) to invest in, use **Fund Research** to find out more about the fund(s).

- 2 To continue, select **Review and confirm**.



# Selecting which fund(s) you want to buy

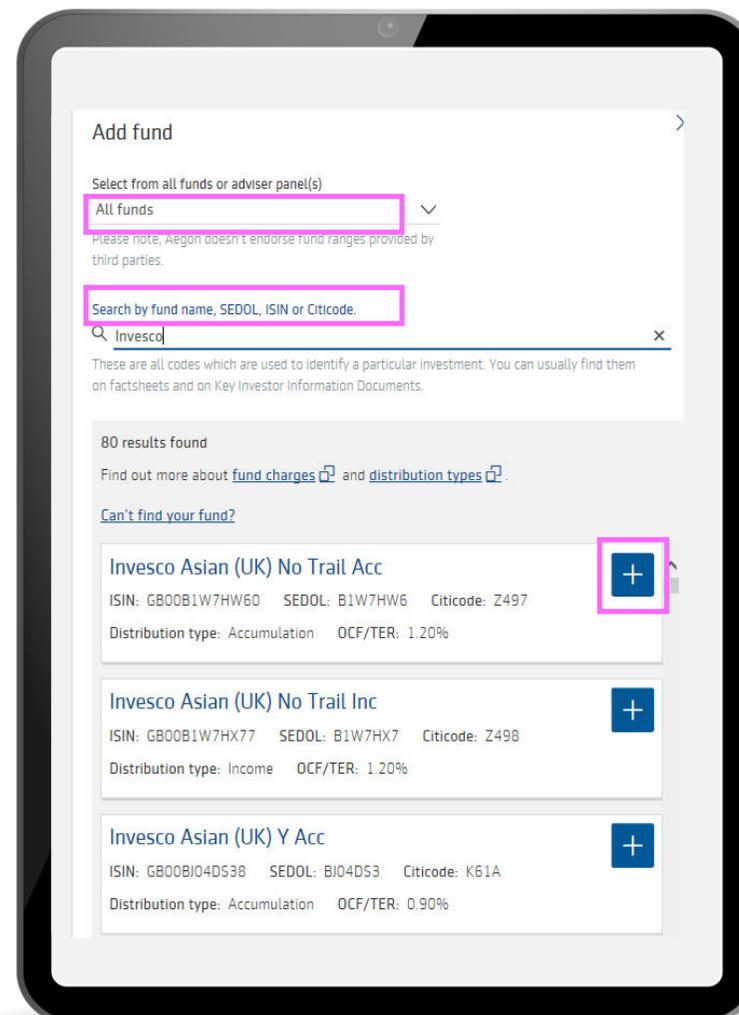
## Finding the funds

You can search for the fund using any of the following:

- Name
- SEDOL
- ISIN
- Citicode
- Fund manager

If you search by fund manager name, we'll show all the funds available for that manager.

Find the fund you want by scrolling through the results. Add it by selecting the + sign.



# Selecting which fund(s) you want to buy

Once you've selected your funds, you need to specify how much of your top up you want to allocate to each fund.

You can allocate by % or £ amount.

The value of investments may go down as well as up and you may get back less than you invest.

Allocate using  %  £ Altering allocation method clears any values already entered

**Amount left to allocate:** 100%  
£20,000.00

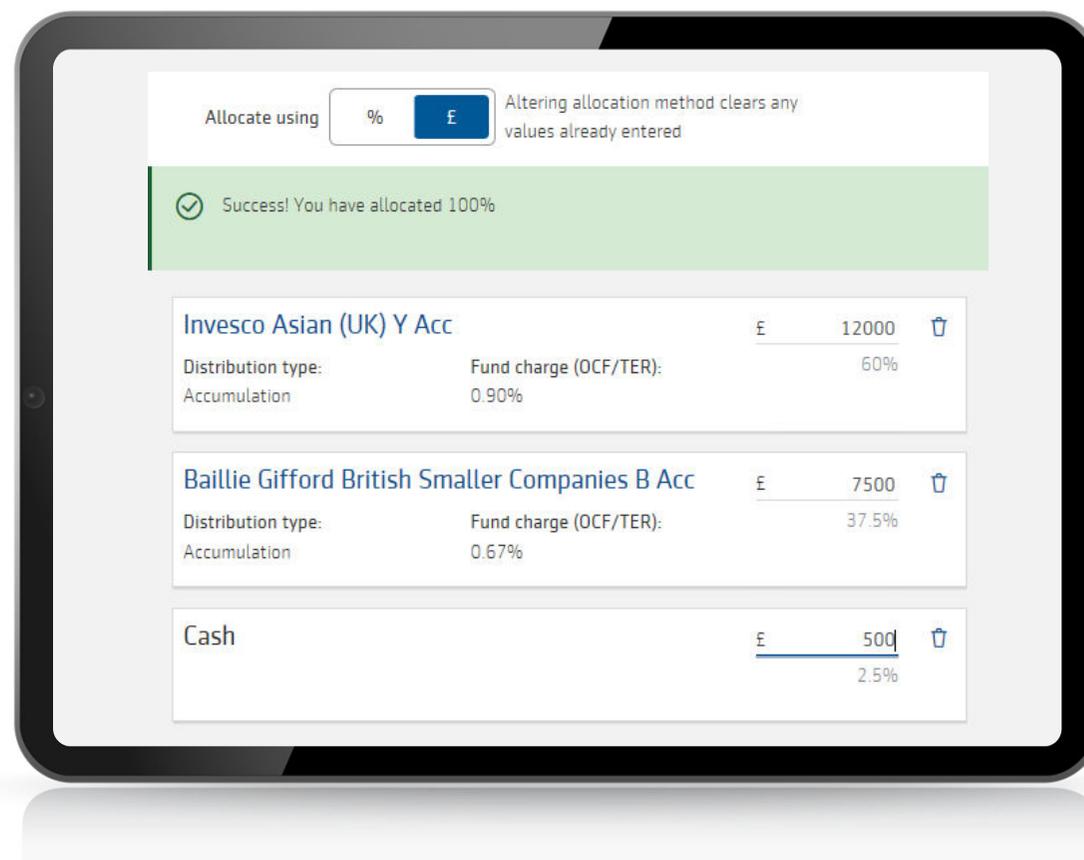
<b>Invesco Asian (UK) Y Acc</b>	<input type="text" value=""/>	%	<input type="text" value="£0.00"/>
Distribution type: Accumulation	Fund charge (OCF/TER): 0.90%		
<b>Baillie Gifford British Smaller Companies B Acc</b>	<input type="text" value=""/>	%	<input type="text" value="£0.00"/>
Distribution type: Accumulation	Fund charge (OCF/TER): 0.67%		
<b>Cash</b>	<input type="text" value=""/>	%	<input type="text" value="£0.00"/>

Add fund

# Selecting which fund(s) you want to buy

Example of allocating by £ amount

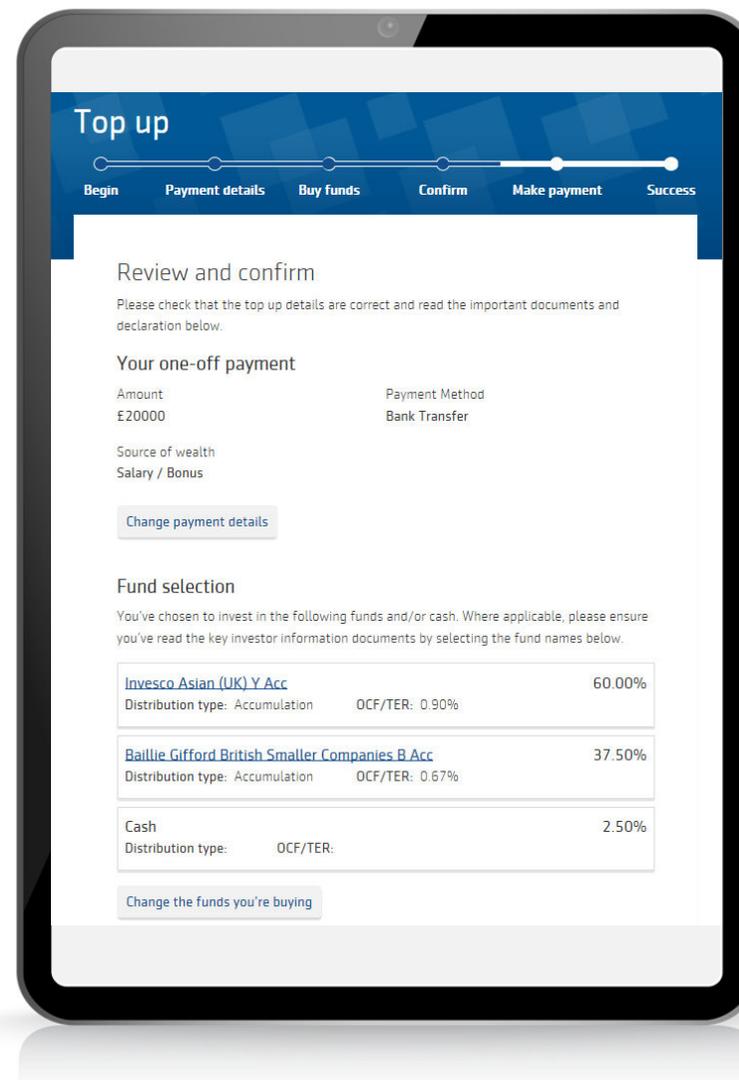
- Even if you select £ amount – you need to make sure you allocate the full amount over the fund(s).
- Once you've allocated 100% against the fund(s) you'll be able to continue.



# Review and confirm your top-up request

The **Review and confirm** screen shows the details of your top-up request.

Double check that you're happy with everything.



# Completing your top up

- 1 You can view illustrations for pre and post the change. We'll also save these in your document store.
- 2 Read the **Legal declaration** and **General declaration**.
- 3 Confirm that you give us permission to carry out your top up.
- 4 Select **Make payment** to complete your request.

**General declaration**

Aegon relies on the information contained in the following documents as they form the basis of you making a further payment to your Aegon ISA:

1. the application,
2. these declarations and any other declarations made when applying to make a further payment to your Aegon ISA,
3. the contract note (where applicable), and
4. the Aegon Platform terms and conditions.

I confirm that I have had the opportunity to read these documents carefully (other than the contract note in relation to making the further payment which will be given to me in accordance with the Aegon Platform terms and conditions), along with my personal illustration, key investor information documents and the declarations in this application before completing this application process.

**In this declaration:**

1. "I", "you", "your" or "my" refers to you, the Investor.
2. "Aegon" refers to Cofunds Limited.
3. 'make a further payment' means one or more of the following:
  - starting to make a regular payment,
  - increasing your regular payment,
  - making a single payment, and/or
  - paying a transfer value,to your Aegon ISA.

**General declaration**

I confirm that I am habitually resident in the United Kingdom.

I confirm I've read the important fund(s) information documents, including the KIID for each selected fund, the declaration and I apply to make a further payment to this product on the basis set out above.

Cancel request

**Make payment >**



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