



For customers

# How to transfer money from a GIA to an ISA on the Aegon Platform



# How to transfer money from a GIA to an ISA

This guide explains how to transfer funds from a general investment account (GIA) to an ISA on the Aegon Platform.

It can take up to nine working days to process your request for a single account. If you have a joint account, please contact your financial adviser or intermediary.

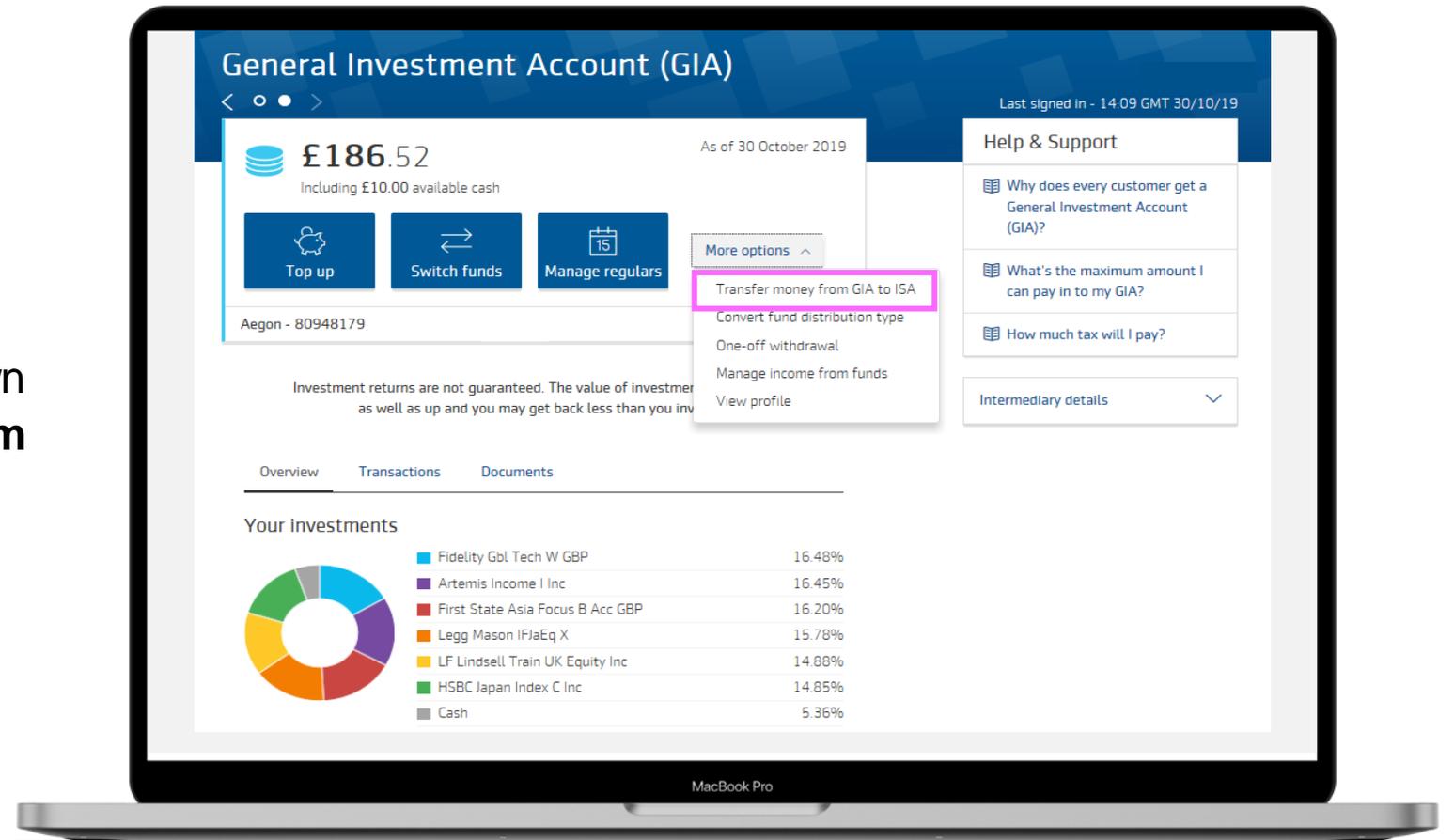
You can only complete this request online if you have transactional access.

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



# How to transfer money from a GIA to an ISA

- 1 Sign in to your Aegon Dashboard account.
- 2 Select your GIA.
- 3 Under the **More options** drop down menu, select **Transfer money from GIA to ISA**.



# Starting your GIA to ISA transfer request

- 1 Along the top of the screen you can see what stage of the process you're at.
- 2 At the start of the process, we ask you to confirm your details.
- 3 Select **Continue** to move on to the next screen.

contact us if any of your details have changed.' A 'Personal details' box contains the following information: Name: Amends Cofunds, Date of birth: 01 January 1960, Address: PO BOX 17491, and Nationality. Below this box is a checked checkbox with the text 'I confirm that my personal details shown above are correct.' At the bottom left is a 'Cancel request' link, and at the bottom right is a blue 'Continue >' button."/>

Transfer money from GIA to ISA

Begin Transfer details Sell funds Buy funds Confirm Success

Before you begin

Please confirm your personal details before you continue

As part of our regulatory requirements we need to check your personal details are up-to-date. You can [contact us](#) if any of your details have changed.

Personal details

Name	Date of birth	Address
Amends Cofunds	01 January 1960	PO BOX 17491
Nationality		

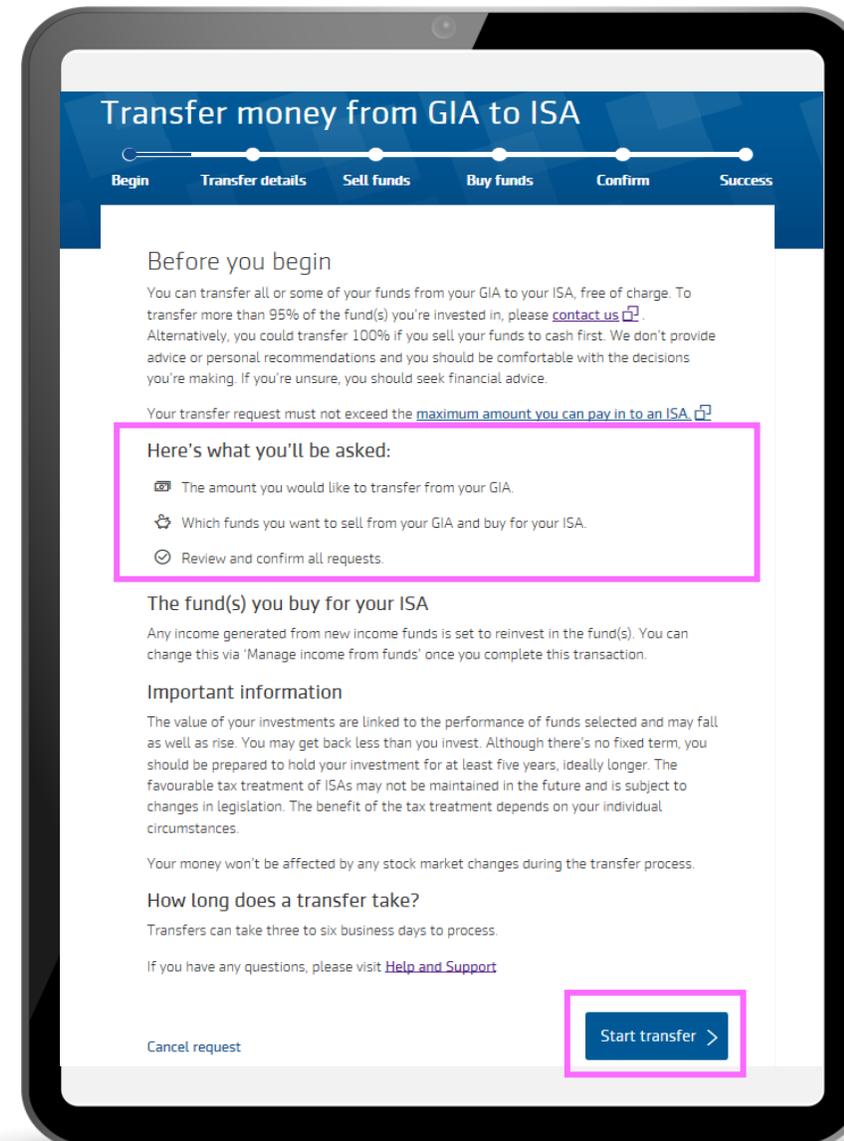
I confirm that my personal details shown above are correct.

Cancel request

Continue >

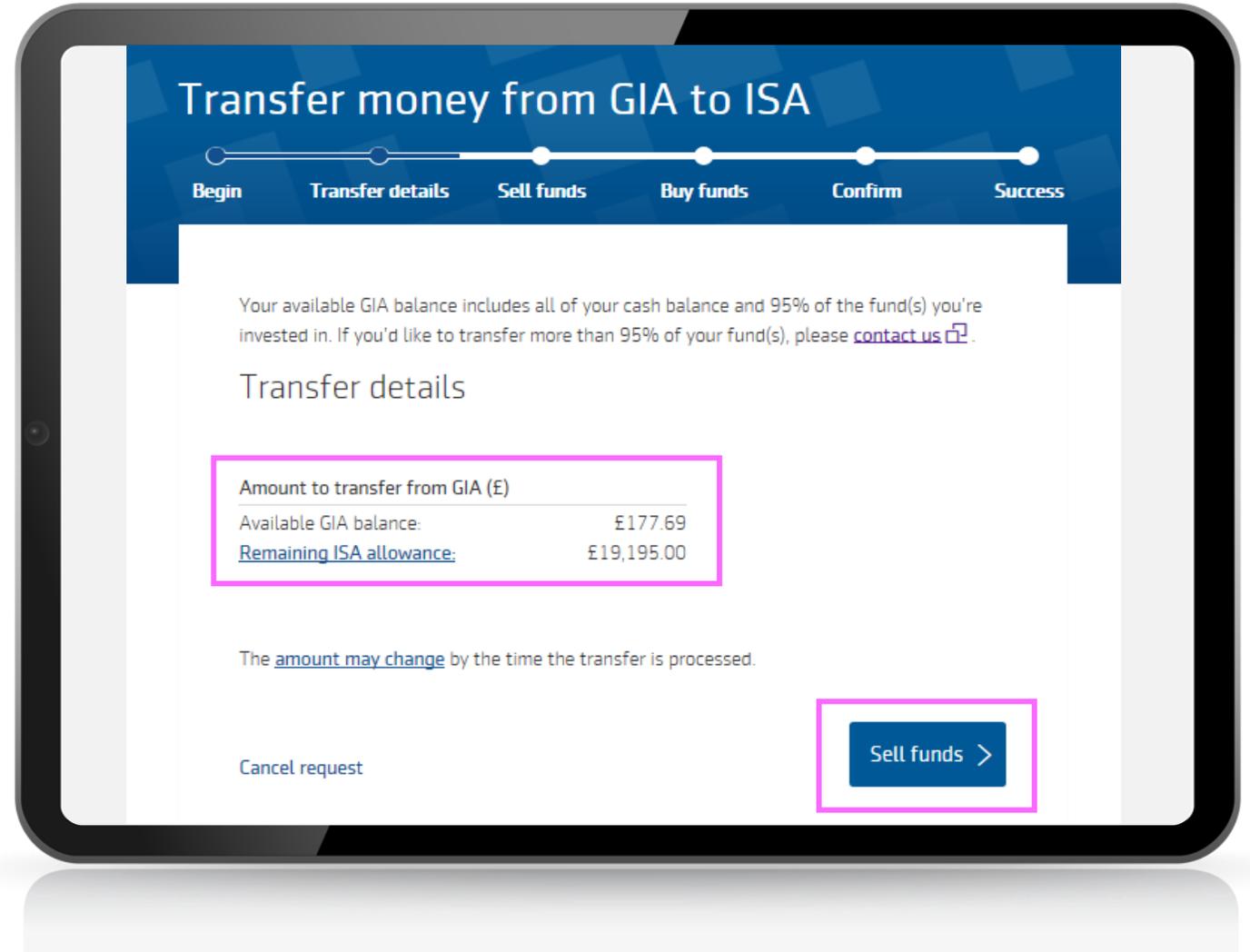
# Starting your GIA to ISA transfer request

- 1 We also set out what you need to do in order to complete the process.
- 2 Select **Start transfer** to continue.



# How much you have available to transfer

- 1 We'll show how much you've got in your GIA available for transferring to your ISA.
- 2 We also show your remaining ISA allowance for the current tax year.
- 3 Now select **Sell funds** to continue. You'll be able to enter how much you want to transfer on the next screen.



# Adding how much you want to transfer

- 1 Enter the amount you want to transfer from your GIA.
- 2 Select how you want us to transfer this amount.
- 3 Select **Sell funds** to continue.

Transfer money from GIA to ISA

Begin Transfer details Sell funds Buy funds Confirm Success

Your available GIA balance includes all of your cash balance and 95% of the fund(s) you're invested in. If you'd like to transfer more than 95% of your fund(s), please [contact us](#).

Transfer details

Amount to transfer from GIA	×
£ 150	
Available GIA balance:	£177.69
<a href="#">Remaining ISA allowance:</a>	£19,195.00

Transfer money from your GIA

How would you like to split the money transferring from your GIA?

- Choose funds to sell from your GIA  
Choose which funds to take money from
- Use current GIA portfolio split  
This takes money in line with your current GIA fund split

The [amount may change](#) by the time the transfer is processed.

Cancel request [Sell funds >](#)

# Confirm how you want us to invest the transfer

- 1 You now need to confirm how you would like us to invest your transfer.
- 2 You can:
  - Re-invest in the same funds as your GIA
  - Choose new funds – we'll ask you to select the fund(s) you want and the percentage split for each one – you can allocate by % or £ amount. If you buy income producing funds we'll reinvest any income back into the fund. If you want, you can change this after you complete your switch request. Our Convert fund distribution type guide will be able to help you.
  - Use your current ISA fund split (if you already have an ISA with us).
- 3 Select **Review and confirm** to continue.

Transfer money to your ISA

How would you like to allocate the money transferring into your ISA?

Re-invest in the same funds and amounts as you're selling from your GIA

Choose funds to buy for your ISA  
Choose from new and/or existing funds and allocate amount

Use current ISA portfolio split  
This invests money in line with your current ISA fund split

This is automatically calculated based on your current portfolio split of your ISA. You can't change any of the funds or allocation you're buying if you choose this option.

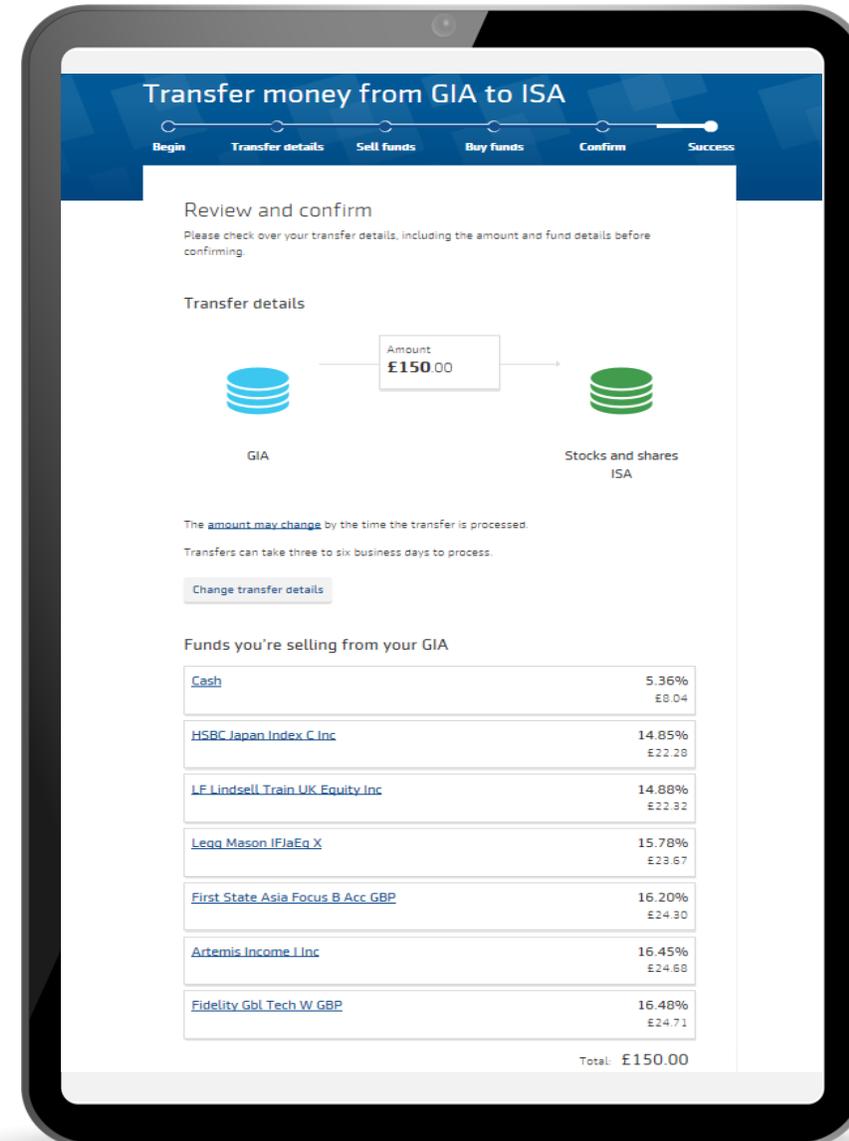
Fund	Buying
JPM US Equity Income C Inc	£9.20
HSBC Japan Index C Inc	£9.53
LF Lindsell Train UK Equity Inc	£13.19
Baillie Gifford American B Inc	£13.64
Legg Mason IFJEq X	£13.71
First State Asia Focus B Acc GBP	£14.19
Fidelity Gbl Tech W GBP	£14.28
Artemis Income I Inc	£14.33
Cash	£47.93
Total	£150.00

The [amount may change](#) by the time the transfer is processed.

[Cancel request](#) [Review and confirm >](#)

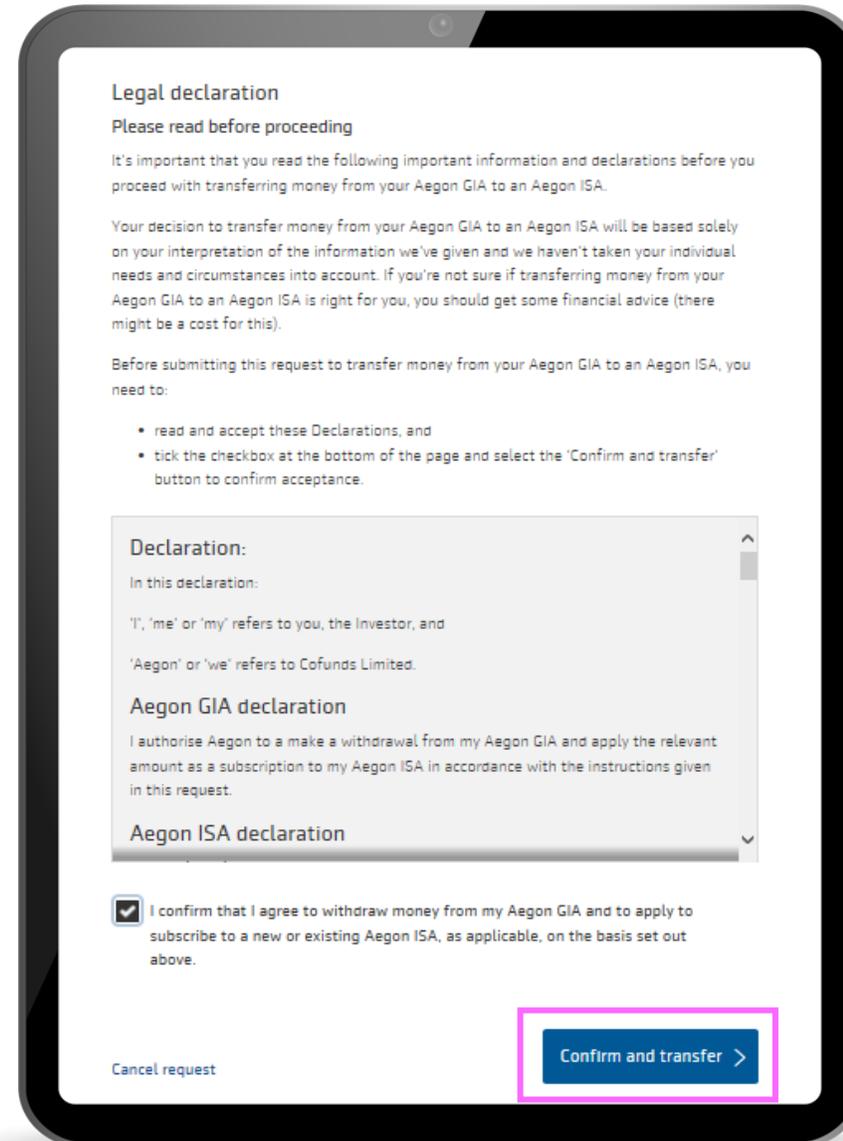
# Review and confirm your GIA to ISA transfer request

- 1 The **Review and confirm** screen shows the details of your switch.
- 2 Double check that you're happy with everything.



# Complete your GIA to ISA transfer request

- 1 Review the important documents we show. We'll also save these in your document store.
- 2 Read the **Legal declaration and Declaration.**
- 3 Confirm that you give us permission to carry out your transfer.
- 4 Select **Confirm and transfer** to complete the process.



The screenshot shows a mobile device screen with the following content:

**Legal declaration**  
Please read before proceeding

It's important that you read the following important information and declarations before you proceed with transferring money from your Aegon GIA to an Aegon ISA.

Your decision to transfer money from your Aegon GIA to an Aegon ISA will be based solely on your interpretation of the information we've given and we haven't taken your individual needs and circumstances into account. If you're not sure if transferring money from your Aegon GIA to an Aegon ISA is right for you, you should get some financial advice (there might be a cost for this).

Before submitting this request to transfer money from your Aegon GIA to an Aegon ISA, you need to:

- read and accept these Declarations, and
- tick the checkbox at the bottom of the page and select the 'Confirm and transfer' button to confirm acceptance.

**Declaration:**

In this declaration:

'I', 'me' or 'my' refers to you, the Investor, and

'Aegon' or 'we' refers to Cofunds Limited.

**Aegon GIA declaration**

I authorise Aegon to make a withdrawal from my Aegon GIA and apply the relevant amount as a subscription to my Aegon ISA in accordance with the instructions given in this request.

**Aegon ISA declaration**

I confirm that I agree to withdraw money from my Aegon GIA and to apply to subscribe to a new or existing Aegon ISA, as applicable, on the basis set out above.

Cancel request

**Confirm and transfer >**



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 Aegon UK

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