



For customers

How to transfer an ISA to the Aegon Platform



How to transfer an ISA

This guide explains how to transfer an ISA to the Aegon Platform.

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

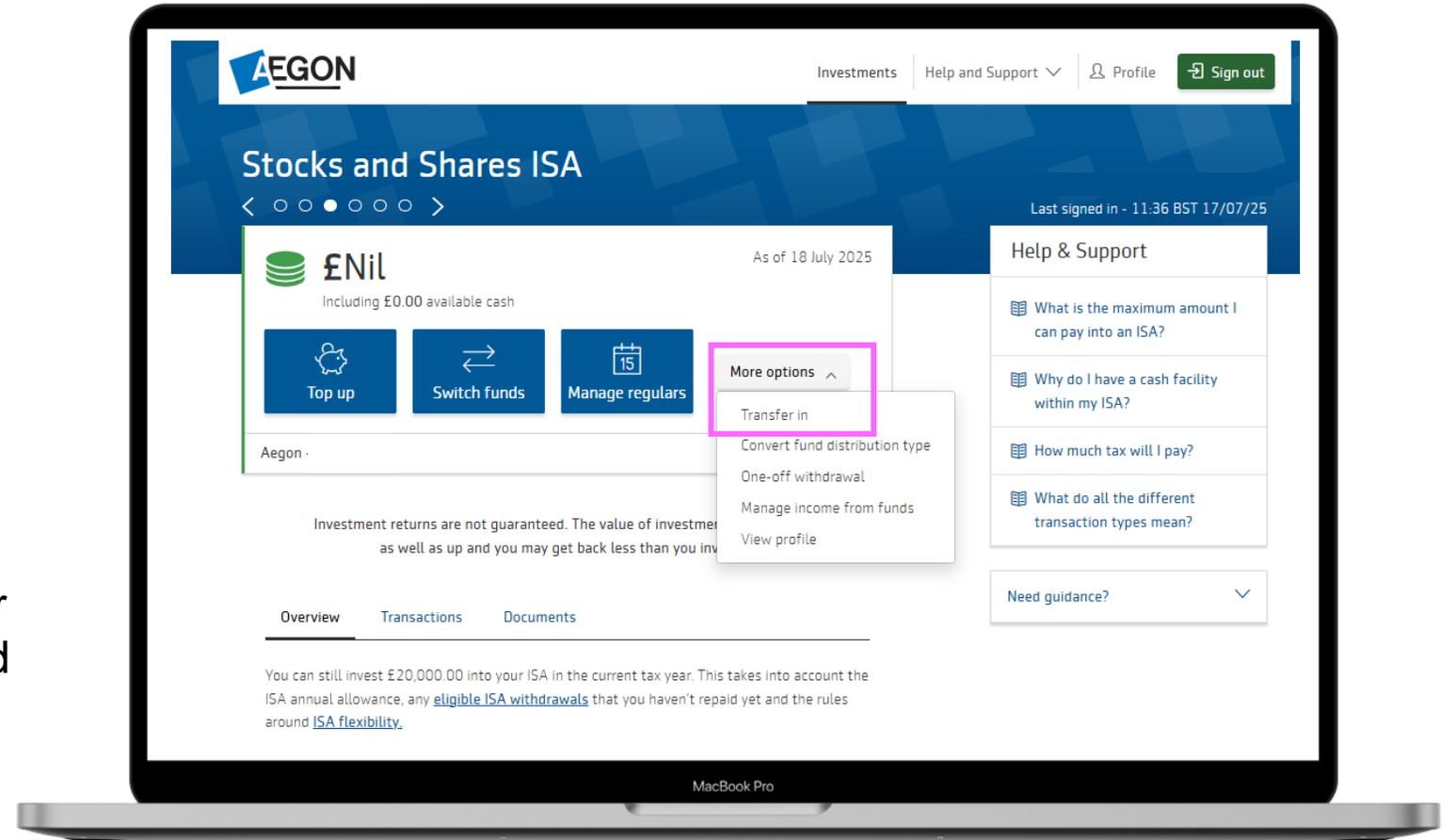
If you have view only access to your account, you need to contact your financial adviser or intermediary.



Signing in to your account

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

For re-registration transfers into a general investment account (GIA) or ISA, please see the notes at the end of this guide.



Starting your transfer in

- 1 Along the top of the screen you can see what stage of the process you're at.
- 2 Check your personal details in the **Before you begin** section.
- 3 Confirm your personal details are correct.
- 4 Select **Continue**.

The screenshot shows the Aegon website interface for transferring an ISA. At the top, the Aegon logo is on the left, and 'Help and Support' with a dropdown arrow and a 'Sign out' button are on the right. Below the header, a blue banner contains the title 'Transfer in another ISA' and a progress bar with six stages: 'Begin', 'Details', 'Options', 'Buy funds', 'Confirm', and 'Success'. The 'Begin' stage is currently active. Below the banner, a white box contains the following content:

Before you begin

Please confirm your personal details before you continue

As part of our regulatory requirements we need 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
		GBR
Nationality	NI number	
British		

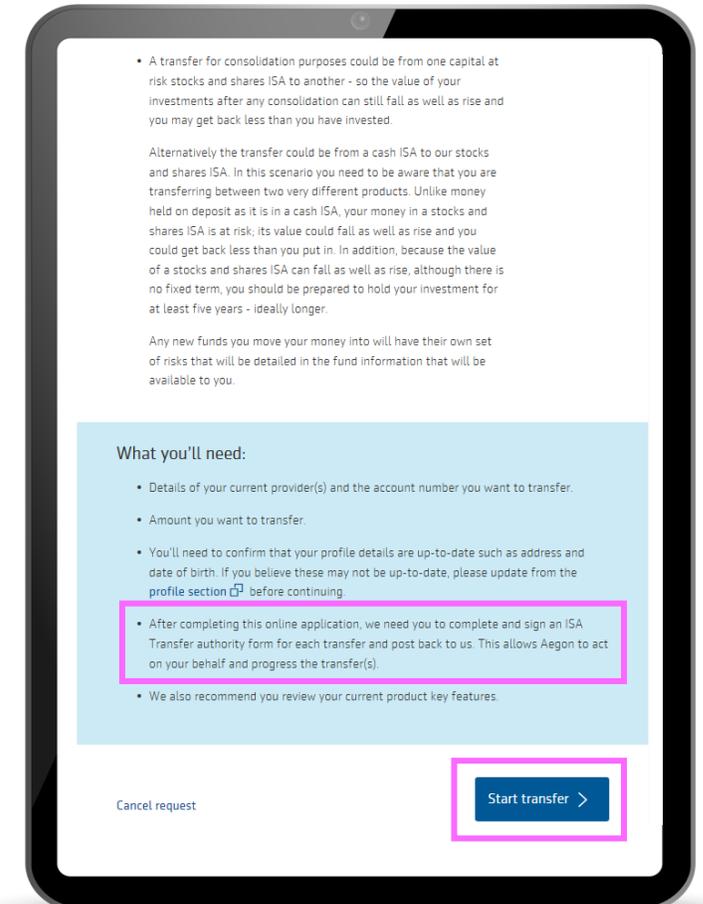
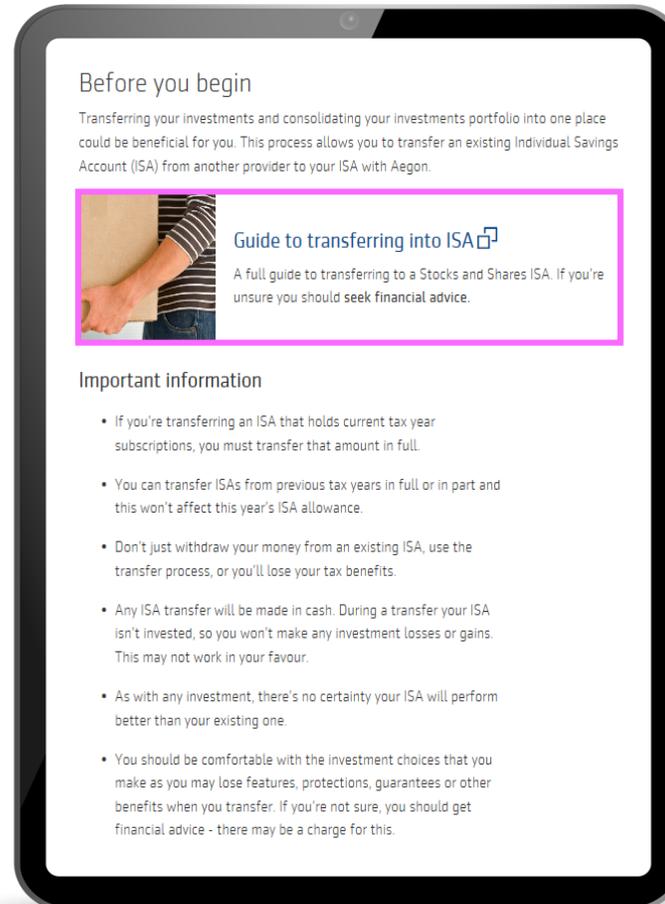
I confirm that my personal details shown above are correct.

Cancel request

Continue >

Starting your transfer in

- 1 You'll now see some important information that you need to consider before making a transfer, including a **Guide to transferring into an ISA.**
- 2 We must receive a signed transfer authority for each transfer you want to do.
- 3 Select **Start transfer** to continue.



Confirm details for your transfer request

- 1 Confirm the **Providers name**.
- 2 Enter the **Account/scheme number** for the ISA you want to transfer.
- 3 Confirm the **Type of ISA** you want to transfer.
- 4 Enter the **Transfer amount** from this ISA.
- 5 Confirm whether you've paid any money into this ISA in the current tax year.
- 6 Select **Allocate funds** to continue.

The screenshot shows a web form titled "Transfer in another ISA" with a progress bar at the top indicating the current step is "Confirm". The form contains the following fields and options:

- Transfer request details**
Please type the name of the provider(s) you wish to transfer from. Alternatively, please select the 'Not sure who is the provider?' option.
- Provider's name**
Aviva
Found on provider annual statement
- Account/scheme number**
12345
Found on provider annual statement
- Type of ISA from previous provider**
 Stocks and Shares ISA Cash ISA
- Transfer amount**
£ 20000
This amount may change on settlement.
- Have you paid in any money to this ISA in the current tax year? (6 April until today)**
 Yes No
- If you can't find your provider's details, you can view an up-to-date list of [Government authorised ISA Managers](#) from HMRC
- Buttons: "Cancel request", "+ Add another transfer in", and "Allocate funds >" (highlighted).

Confirm how you want us to invest the transfer

- 1 You now need to confirm how you'd like us to invest your transfer.
- 2 You can:
 - i. Choose funds to buy
 - ii. Use your current ISA fund split (if you already have an ISA with us)
 - iii. Put the money into your cash facility
- 3 Select **Buy funds** to continue.

Transfer in another ISA

Begin Details Options **Buy funds** Confirm Success

How do you want to invest your money?

Transfer value: £20,000.00 This [amount may change](#) by the time the transfer is processed as your full account transfer value may be different.

Choose funds to buy
This allows you to allocate the transfer amount into new or existing funds in your ISA.

Place into your ISAs Cash facility
You can transfer into a Cash facility and allocate funds later through a 'Switch' process.

If you're unsure about your fund allocation please speak to your intermediary if you have one, or [contact us](#).

Cancel request **Buy funds >**

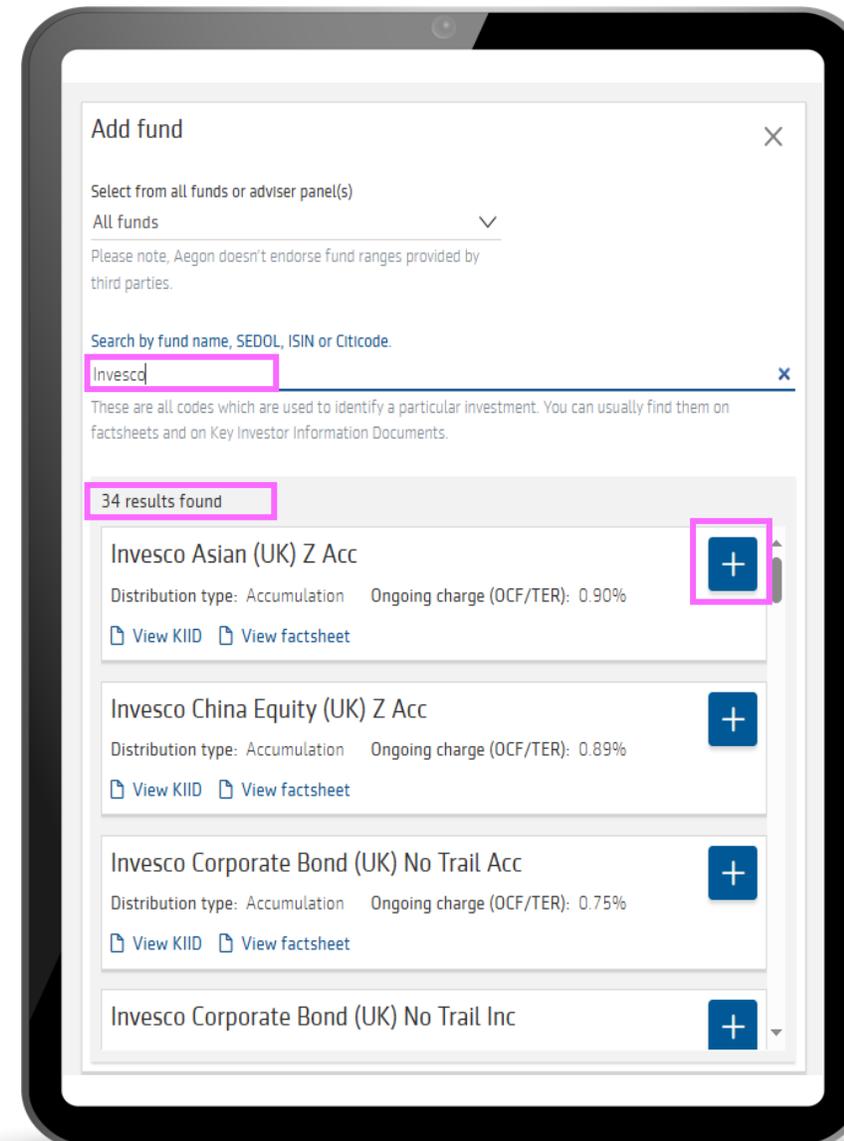
Selecting which fund(s) you want to buy

You can search for a 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.



Allocating your transfer to funds

- 1 Once you've selected your funds, you need to specify how much of your transfer you want to allocate to each fund.
- 2 You can allocate by % or £ amount.

The value of investments isn't guaranteed. It 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

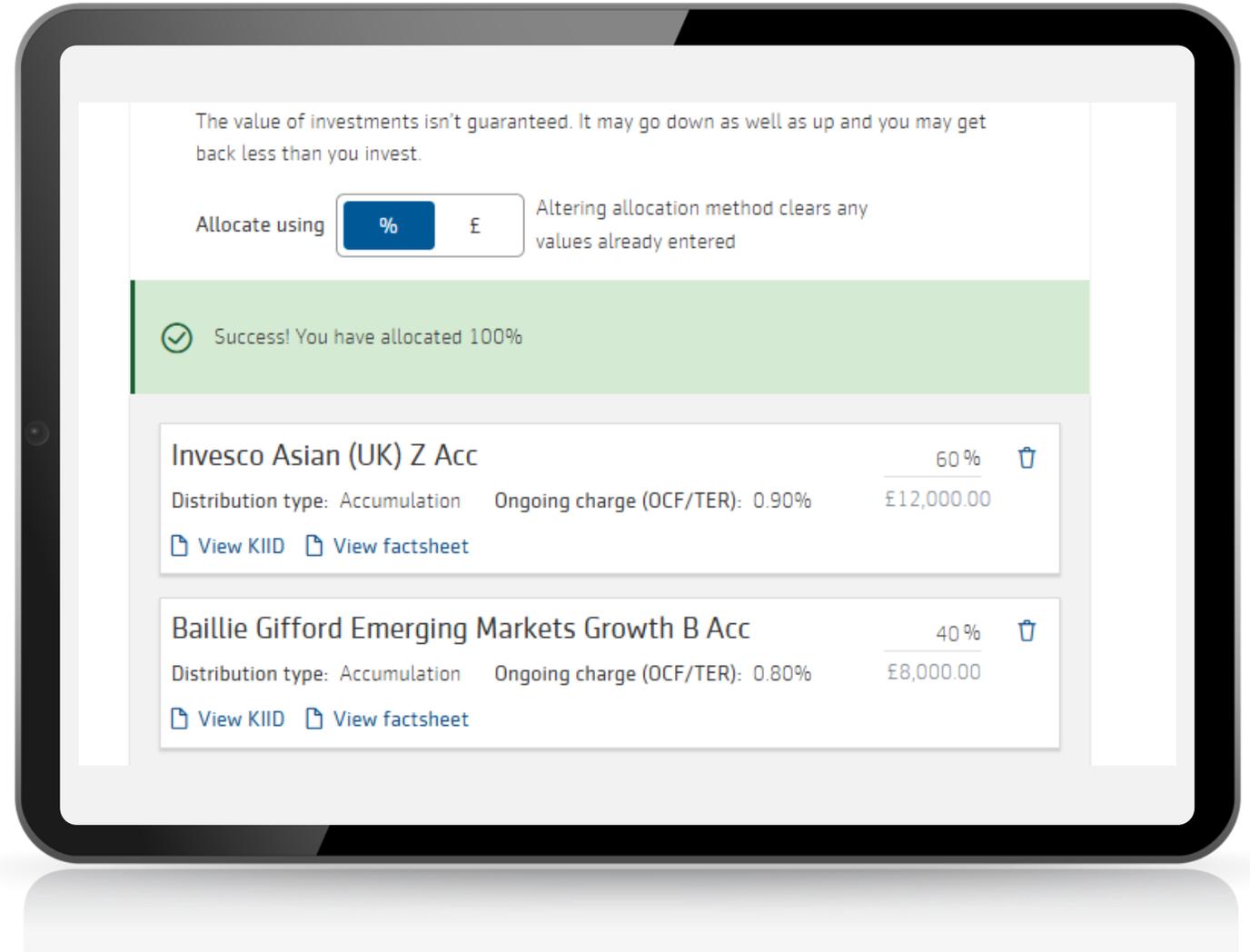
Amount left to allocate: 100%
£20,000.00

Invesco Asian (UK) Z Acc	<input type="text" value=""/>	<input checked="" type="radio"/> %
Distribution type: Accumulation Ongoing charge (OCF/TER): 0.90%	<input type="text" value="£0.00"/>	
View KIID View factsheet		
Baillie Gifford Emerging Markets Growth B Acc	<input type="text" value=""/>	<input checked="" type="radio"/> %
Distribution type: Accumulation Ongoing charge (OCF/TER): 0.80%	<input type="text" value="£0.00"/>	
View KIID View factsheet		

Allocating your transfer to funds

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

The **Review and confirm** screen shows the details of your transfer request.

Double check that you're happy with everything.

Review and confirm transfer details
Please review your transfer details carefully before confirming.

Transfer request one

Name of provider Aviva	Type of ISA Stocks and Shares ISA
Reference ID	Approximate transfer amount £20,000.00
Edit these details	Tax year ISA contribution value £0.00

Your details

Name	Home address
Date of birth	

[Are these details wrong?](#)

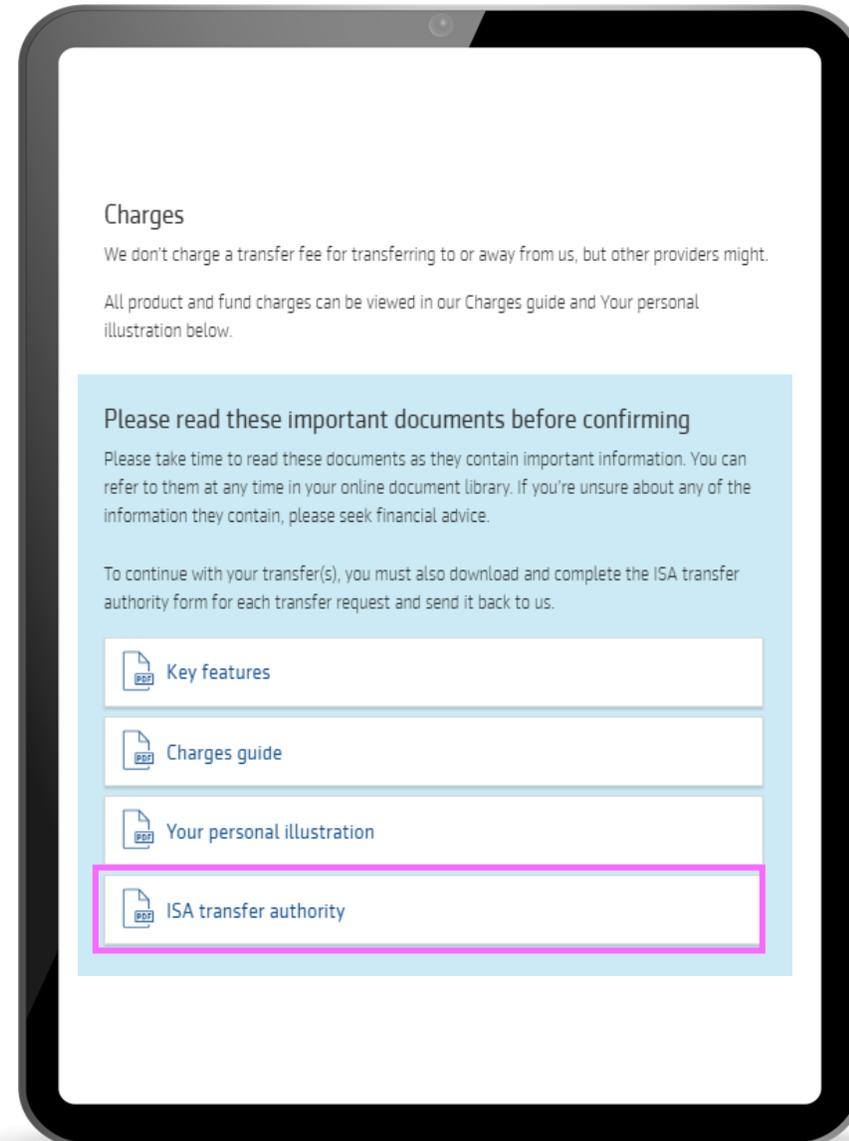
Fund allocation

You've chosen to invest in the following funds and/or cash. Where applicable, please make sure you've read the Key Investor Information Document (KIID), fund factsheet, Consumer Facing Disclosure Report and any other sustainability documentation (if the fund considers sustainability factors), by selecting the fund names below.

Invesco Asian (UK) Z Acc	60.00%
Distribution type: Accumulation Ongoing charge (OCF/TER): 0.90%	
View KIID View factsheet	
Baillie Gifford Emerging Markets Growth B Acc	40.00%
Distribution type: Accumulation Ongoing charge (OCF/TER): 0.80%	
View KIID View factsheet	

Print, sign and post transfer authority

- 1 You need to print, sign and post a **Transfer Authority** for each transfer so that we can request the ISA from your existing provider.



Completing your transfer

- 1 You can view illustrations for your transfer. 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 transfer.
- 4 Select **Complete transfer(s)**.

Legal declaration
Please read before proceeding

It's important that you read the following important information and declarations before proceeding with making a transfer payment(s) to your Aegon ISA.

Your decision to make a transfer payment(s) to your 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 making a transfer payment(s) to your Aegon ISA is right for you, you should get some financial advice (there might be a cost for this).

Before submitting this application to make a transfer payment(s) to your Aegon ISA, you need to:

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

General declaration

In this declaration:

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

'Aegon' refers to Cofunds Limited.

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

1. the application,
2. these declarations and any other declarations made when applying to make a transfer payment(s) to your Aegon ISA,
3. the contract note, and

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

Cancel request Complete transfer(s) >



Making a transfer into an ISA

If you want to make a GIA or ISA re-registration transfer in, please **contact us** to request an illustration and an application form.

Please have the following information ready:

- The names and SEDOL numbers of the funds you'd like to re-register to us.
- The current value of these funds.



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