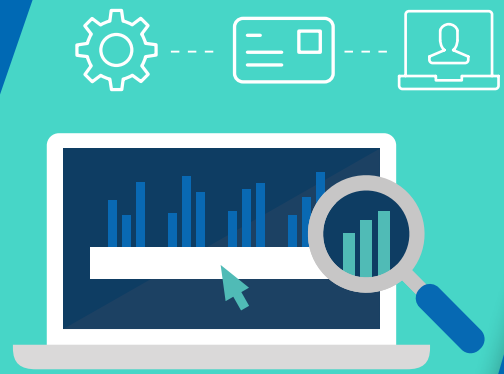


For financial advisers only

How do I... identify clients with unused ISA allowance?

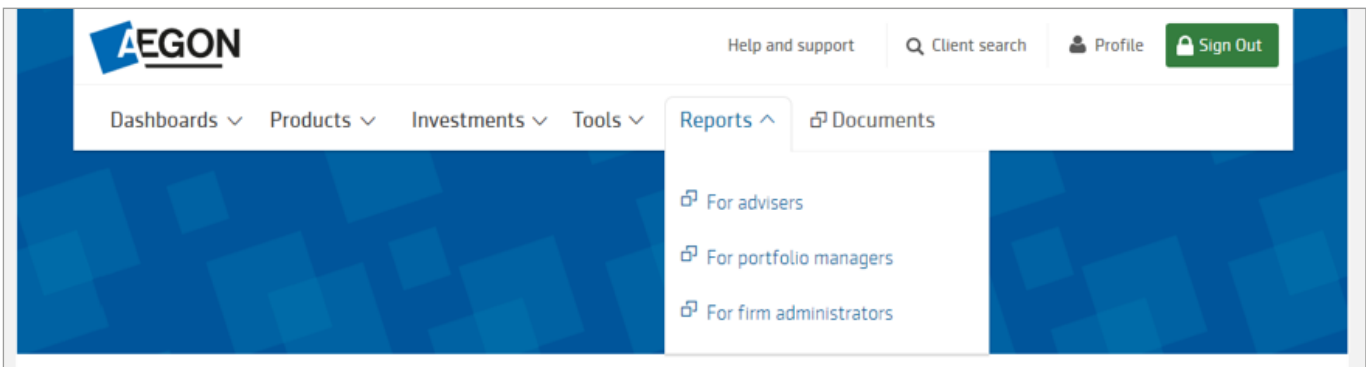


You can use Report Zone to access a wealth of information about your firm and your clients in one place and spot potential opportunities.

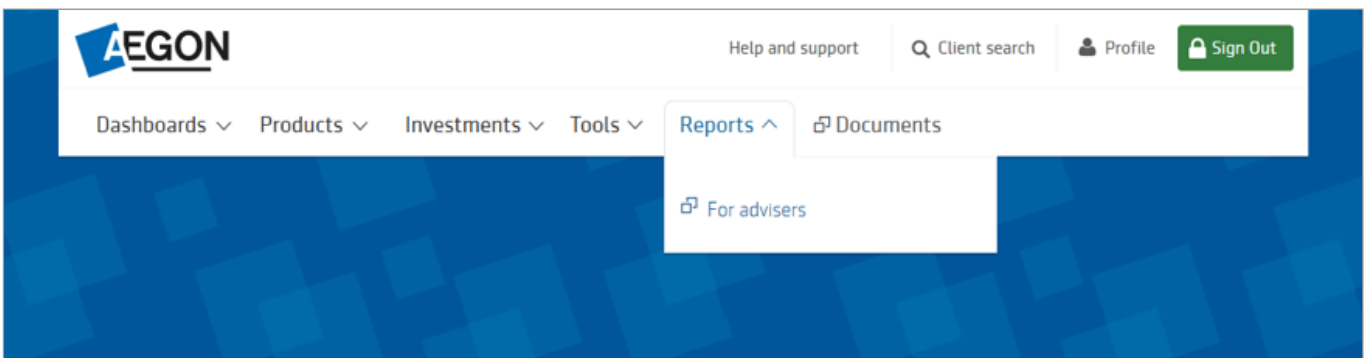
Follow our step-by-step guide to find out which of your Aegon Platform clients haven't used up their full Aegon ISA allowance.

Step-by-step guide

- 1 You can access Report Zone from your dashboard.
User with multi-roles:



User with a single role:



2 Select Product wrappers opened and held.

Reports

Report group
+ Adviser remuneration
+ Client valuations
+ Income distributions received
+ Investments held and traded
+ Model portfolio management
+ Product wrappers opened and held

3 From the dropdown select Remaining ISA allowance.

4 To generate the report select the relevant branch and adviser from the dropdown and select **Get data**. The report will open in Microsoft Excel, allowing you to sort and manage the data.

Remaining ISA allowance

Branch: ▼ Adviser: ▼

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Check the **Available ISA allowance** column to find out which of your clients have ISA allowance left and how much they have left.

You can also check the amount paid into their ISA in the previous tax year in the **Previous tax year subs** column.

Example report (all fields in report not shown below):

Custsurname	Addressline1	Addressline2	Addressline3	Addressline4	Postcode	AvailableISAallowance	Previoustaxyears	Investmentfundsva	ISAreularcontribution
Client 1	House Number 1	Street Name	Town Name	County Name	EH12 9SE	20000	0	45789.21	0
Client 2	House Number 2	Street Name	Town Name	County Name	EH12 9SE	20000	0	74289.1	0
Client 3	House Number 3	Street Name	Town Name	County Name	EH12 9SE	20000	15000	0	0
Client 4	House Number 4	Street Name	Town Name	County Name	EH12 9SE	20000	4000	0	0
Client 5	House Number 5	Street Name	Town Name	County Name	EH12 9SE	14000	20000	0.99	0
Client 6	House Number 6	Street Name	Town Name	County Name	EH12 9SE	0	20000	150012.7	0
Client 7	House Number 7	Street Name	Town Name	County Name	EH12 9SE	1500	100	5000	0
Client 8	House Number 8	Street Name	Town Name	County Name	EH12 9SE	18000	8000	0	0
Client 9	House Number 9	Street Name	Town Name	County Name	EH12 9SE	1200	20000	0	0
Client 10	House Number 10	Street Name	Town Name	County Name	EH12 9SE	0	10000	99843.13	0
Client 11	House Number 11	Street Name	Town Name	County Name	EH12 9SE	0	13000	254976.1	0
Client 12	House Number 12	Street Name	Town Name	County Name	EH12 9SE	5000	3000	12087.86	0
Client 13	House Number 13	Street Name	Town Name	County Name	EH12 9SE	3000	1500	0	0
Client 14	House Number 14	Street Name	Town Name	County Name	EH12 9SE	0	20000	0	0
Client 15	House Number 15	Street Name	Town Name	County Name	EH12 9SE	1000	20000	87341.54	0
Client 16	House Number 16	Street Name	Town Name	County Name	EH12 9SE	20000	10000	0	0
Client 17	House Number 17	Street Name	Town Name	County Name	EH12 9SE	12000	3000	39221.12	0



Handy hint

Products are referred to as **product wrappers** or **wrappers** in Report Zone.

Questions and answers

❓ Does the remaining ISA allowance take into consideration future regular contributions?

No. The ISA allowance you see on the product summary screen is at the current date and doesn't account for future regular contributions.

❓ Do I need to set up an ISA separately if I'm moving cash from a GIA to an ISA?

No. When moving cash from a GIA to a new ISA, the online GIA to ISA switch also creates the new ISA for you.

If you have any questions please visit our [support page](#) for assistance.