



For financial advisers and customers

Tax year end deadlines

Aegon Platform

The following guide highlights the important deadlines for submitting business on the Aegon Platform ahead of tax year end.





Deadlines for making payments in 2024/25 tax year

Payment type

Deadline

Debit card	11.45pm on 5 April 2025
Faster payments	5.00pm on 5 April 2025 ¹
CHAPS/BACS	5.00pm on 5 April 2025 ¹
Cheques	10.00am on 4 April 2025
Direct Debit – last date to set up or amend for collection this tax year 2024/25	Tuesday 18 March 2025
Direct Debit – to collect first month of 2025/26 tax year	Tuesday 8 April 2025

¹ cleared funds must be received by this deadline





Aegon ISA and Aegon SIPP deadlines

Aegon ISA

GIA – available cash to fund ISA

Deadline

Wednesday 2 April 2025

GIA – investment to fund ISA

Friday 21 March 2025

Joint GIA – available cash to fund ISA

Wednesday 2 April 2025

Joint GIA – investment to fund ISA

Friday 21 March 2025

Third party GIA – available cash to fund ISA

Friday 21 March 2025

Third party GIA – investment to fund ISA

Thursday 13 March 2025

Aegon SIPP

Tax-free cash payment or one-off payment request

Deadline

Monday 24 March 2025

If cash is available to fund, we must have the fully completed instruction

Monday 31 March 2025





Cofunds Pension Account (CPA) deadlines

New applications and top ups

New applications

Deadline

Coming soon

Cheque contributions

Coming soon

Contributions funded from Aegon GIA cash facility

Coming soon

CHAPS/BACS contributions

Coming soon

Direct Debit set up – for collection in this tax year 2024/25

Coming soon

Drawdown and income

Deadline

New drawdown request

Coming soon

Income payment – cash available

Coming soon

Income payment – disinvestment required

Coming soon





Top five reasons requests are unsuccessful:



Payments don't clear in time – make sure you're aware of the cut-off times and your bank's payment timescales.



Requests are incomplete – make sure you include all required information before you submit.



Requests are lost – send applications by recorded delivery.



Cheques issues - details on cheques are incorrect.



No payment sent - we receive the request but no payment.



Important considerations

- **Cleared funds means money is available as cash in our account.** Please allow enough time for funds to clear.
- **Electronic payments need to be cleared in our account by the deadline.** We recommend submitting payments well in advance of the deadline date to allow for the payments to clear in our account.
- **We don't collect BACS or CHAPS payments.** You can make these payments by requesting them directly with the bank, we won't collect any payments. It can take between three and five working days to process, so keep this in mind when making a payment at tax year end.
- **Remember to include the reference number when making a payment.** Failing to include this could mean we're unable to identify and allocate the payment. We won't be able to backdate the payment to the 2024/25 tax year after 5 April 2025. If this occurs, we'll contact you regarding what action to take here.
- **Where an application and/or payment is incomplete or unclear.** If we're unable to obtain clarification before the deadlines, it may result in the investment falling outside of the 2024/25 ISA allowance



For more information

Customers can visit aegon.co.uk/support

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio version of this document, please visit aegon.co.uk/additional-support or call 03456 044 001 (call charges will vary).

Advisers can visit aegon.co.uk/tye

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