Instruct an Ad-hoc GIA/ISA Withdrawal

Single withdrawals can be instructed on the platform. Payments are made by BACS which will arrive with the client in three working days. Where sales are needed for a withdrawal however, the platform will send the instruction as soon as the trades are priced, so the payment will still be with the client in three to five working days, even when needing sales to fund it.

YOUR ISAs are Flexible ISAs.

Step by step

- Access the account in question on the platform from either the 'Accounts' section with the 'Clients' option, or from within the client record

- Click 'Account actions' at the top right and select 'Withdraw' from the options, you will then be presented with the withdrawal screen

- For 'Withdrawal type', click the button to select 'Single'

- Enter the amount

- There is a warning to ensure you are aware of cash for fees. The platform will sell automatically for regular withdrawals and for fees. If you withdraw this cash shortly before they are paid it may delay the payments.

- Where there is sufficient cash for the payment, it will not trigger sales. Where there is not, it will trigger an auto disinvest

- Select to either auto disinvest by proportion or from the largest holding, for models the default should be to sell proportionally.

- Click the 'Review' button and if happy press 'Submit'

- Any required sales will be placed

- Once cash is available, or any required sales have the price confirmed, the withdrawal is sent via BACS

- The client will receive an email notification as well as a confirmation the withdrawal has been placed in their messages on the platform