CLIENT CONTRIBUTIONS
Guidance and Checklist

Overview

Client contributions can be set up on the platform, whether they are one-off or regular contributions.

Audience

This document is intended for **Advisers** and **Account Providers** and **Support Staff**, including those with the **Client Manager** role.

Requirements

Contributions on behalf of a client can be set up on the platform by either the:

- Appointed **Adviser** of the client; or
- Someone with the **Account Trustee** role of the Account Provider

Steps

1. Select client, navigate to the required account and select **Personal Contributions**
2. Navigate to the **Add a Contribution** section and follow on screen instructions for a regular/one off contribution. If it is an ISA, upload copy of contribution form.
3. For confirmation of the bank details and client's individual reference, navigate to the **Deposit Funds** section.

Contact Us

If you would like to learn more, please get in touch.

Call us on 0330 123 9830

Lines are open 8.30am to 5pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at investing@tavistockplatform.com

We aim to provide an initial response to your query on the same working day.

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