

Investment details for ISA

Last Modified on 26/04/2017 2:15 pm BST

When including a ISA Stocks and Shares in your research, you need to complete the ISA **Investment** panel.

Click on **ISA** on the left hand menu



On the right hand **Investment** pane, complete the amount of contribution that will be invested in the ISA. If a regular contribution is to be made, select the frequency from the drop down list (Options are: Monthly, Bimonthly, Quarterly, Half-yearly & Annually). Transfer amounts from previous tax years can be included.

Investment
please enter details of the amount you would like to invest

CURRENT TAX YEAR
amounts (£)

single

transfer

frequency

regular

PREVIOUS TAX YEARS
amounts (£)

transfer

Once the features and investment sections have been completed for all selected wrappers, move to the fund section to select a portfolio for each.
