

I am doing ISA research and have to specify GIA amount – why is this?

Last Modified on 26/04/2017 3:25 pm BST

If as part of your client's criteria, you want to include Unit Trusts / OEICs or Investment Trusts into the feature selection, GIA specific amount becomes mandatory to be filled in. The reason for this is that you have selected Unit Trusts / OEICs or Investment Trusts as a platform feature and therefore the system automatically includes the General Investment Account into the research and the **GIA specific** field becomes mandatory to be filled in.

If you wanted to just include ISA into the platform, untick Unit Trusts / OEICs or Investment Trusts and the GIA will be unavailable when ISA is selected. You can still include funds from Unit Trust / OEIC fund universe as part of the research from the fund portfolio selection screen.
