



Tax Year End Cut Off Dates: 2021/2022

As the end of the tax year approaches, this document provides you with the key deadlines to ensure ISA & SIPP applications, top-ups and subscriptions are received and applied for your clients. Unfortunately, we can't backdate any cash funding received in our bank account after 5th April 2022.

4:30pm on Friday 1st April 2022

New **SIPP** applications and top-ups to existing **SIPP** accounts must be fully completed and submitted

4:30pm on Monday 4th April 2022

New **ISA** applications and top-ups to existing **ISA** accounts must be fully completed and submitted

Monday 4th April 2022

The latest date for receipt of cheques and corresponding cheque funding case summary forms (by post or courier) to our Worthing PO Box address to qualify for the 2021/2022 tax year (no hand deliveries please)

Tuesday 5th April 2022

The latest date for receipt of electronic payments (BACS, CHAPS, Faster Payments) into our bank account to qualify for the 2021/2022 tax year

4:00pm on Tuesday 5th April 2022

Wealth Platform top-ups must be submitted to be processed in the 2021/2022 tax year

Top tips to ensure you meet the deadlines:

- Ensure the relevant client account number is quoted clearly as the reference on electronic payments to avoid delays in funds being applied to the correct account
- Ensure that any amendments are signed by the client before sending in cheque payments as our bank, HSBC, will not accept any amendments on cheques that are only initialled
- Ensure that all paperwork, including the signed declaration with the correct tax year (2021/2022) detailed in the ISA section, has been uploaded to the relevant online application or top-up library
- Ensure an online top-up is added for a GIA or ISA, prior to any electronic payments or cheques being sent
- Direct Debit collection dates must be on or before 5th April to qualify for the 2021/2022 tax year

A copy of the new declaration, quoting the 2022/2023 tax year, is now available in our online library, titled 'Individual Declaration (for tax year 2022/2023)'.

If you have any queries, please contact the Support team via ticket or by calling 01403 33 44 77.

