Electronic ISA transfers

7IM Platform FAQs

March 2026

What is the ‘Add transfer’ journey?

The journey allows you to submit transfers into an Individual Savings Account (ISA) digitally for existing clients, where the ceding provider accepts electronic transfers. The Add Transfer journey will advise you if the provider does not accept electronic transfers and a manual transfer form will be required.

What is the difference between an electronic and manual transfer in?

Electronic: An electronic transfer in is a digital transfer process used when the ceding provider supports electronic transfers (e.g., via Equisoft). **7IM are not required to send the provider a signed client instruction.**

Manual: When the provider does not support electronic transfers or the provider cannot be found in the provider database. **7IM will be required to send a client instruction to the provider.**

Do I need paperwork for electronic transfers?

Transfer forms do not need to be sent to 7IM as part of the electronic transfer process. You will be met with a declaration, which can be accepted via a simple tick box in the digital journey.

Where do I start the ‘Add transfer’ process?

The process can be initiated either after selecting a client’s account (ISA) from Platform or via Client Hub.

Access from Client Hub: Find your client – client summary – Client Hub – ISA/ Investment – “Add transfer”.

Access from 7IM Platform: Find your client – choose wrapper – summary screen – select “Add transfer” on wrapper summary.

The initial screen will show:

- Account type
- 7IM account number
- Account holder(s)
- Provider search field

How do I submit my transfer?

- **Find your provider**
    - Use the provider search field and type at least three characters. Results show:
    - Provider name
    - City
    - Postcode (included to help you locate the correct Provider)
    - Please note, some providers may not have an address or postcode listed. For any support or queries on provider information please contact platformmailbox@7im.co.uk
- **Electronic transfer**
    - All fields marked with * are mandatory

    - Click continue after choosing provider
- **Enter transfer details**
    - Transfer method
    - Transfer type
    - Plan number
    - Estimated transfer value
    - Additional transfer instructions (Partial transfers only)
- **Once details are entered press "Review"**
- **Review transfer details**
- **Review and accept transfer declaration**
- **Submit transfer**
- **Please note: if you wish to amend your transfer information you can select "Edit" on the transfer details and review pages. Alternatively, you can select "Back"**

What if the provider doesn't support electronic transfers?

- You'll be shown a **manual transfer** section that explains:
    - This provider does not allow electronic transfers
    - A link to download the relevant transfer form
    - Email address to send the form to (platformmailbox@7im.co.uk. The email address can be copied to your clipboard.

What happens when I submit an electronic transfer?

- Make sure your client is ready to proceed before submitting the transfer.
    - The 'Submit' button will indicate 'Submitting…' while the system processes your transfer.
    - Once successful, a case is created on 7IM's internal systems, and the case ID is shown to you.
    - On the Success screen you can choose to:
        - **Finish –** return to the Platform account page or Client Hub for the client, depending on where you initiated the journey.
        - **Add new ISA transfer –** return to the input provider screen to start a new request for the same ISA account (with no provider selected).

What if something goes wrong during submission?

If there is an issue connecting to our systems during the 'Add transfer' process, a clear error message will appear blocking the page so you can take corrective action.

What if something goes wrong after submission?

If there is an issue with your transfer submission, once it is with our internal team, if for any reason, it does fail, the Transfer team will notify you via "Assets in Transfer" or email.

Can I capture the transfer details for my own records?

After submission you can view your transfer progress in Assets in Transfer on Platform.

You can also take a screenshot or “print screen” on the transfer summary page.

What happens if I exit during the process?

When you exit the process on the initial provider search screen, a pop-up appears with:

- **No, stay –** keeps your entries
- **Yes, exit –** returns you to where you launched the transfer journey (Platform or Client Hub)

How long will it take my transfer to be reviewed?

- **Electronic –** within 24 hours
- **Manual –** within 5 working days on receipt of completed paperwork

All transfers can be viewed in the Assets in Transfer screen on Platform

Why do some providers not appear?

There may be instances where 7IM do not currently hold records from some ceding providers. If you are unable to find a specific provider on our drop-down selection field you will be guided down the manual transfer journey and prompted to download the 7IM transfer form.

To inform us of the missing provider please:

- Email us: Platformmailbox@7im.co.uk
- Call us: 020 7760 8707

What if I want to cancel my transfer after submission?

It may not be possible to cancel a Transfer after submission. Please contact the Platform Support Team on 020 7760 8707 with your transfer reference which can be found in the Assets in Transfer tab in your Client Summary or on the submission page of the digital transfer journey.

How do I make a change after I submit my transfer?

It may not be possible to change a Transfer after submission. Please contact the Platform Support Team on 020 7760 8707 with your transfer reference which can be found in the Assets in Transfer tab in your Client Summary or on the success page of the digital transfer journey.

Can I submit more than one transfer on one form?

You can only add one transfer per form. At the end of the digital journey you will see a button which says “New ISA/Investment transfer”, this will take you back to the provider selection so you can add another transfer for the same client.

If you wish to add a transfer for another client, you will have to go back to Platform and select a new client then enter the transfer process from the new client's wrapper.

Can I still use the paper form if I want?

We strongly encourage you use the new transfer journey from launch. We will only be accepting transfer forms for providers who offer electronic transfers for a short period of time, during the adjustment period to the new digital journey.