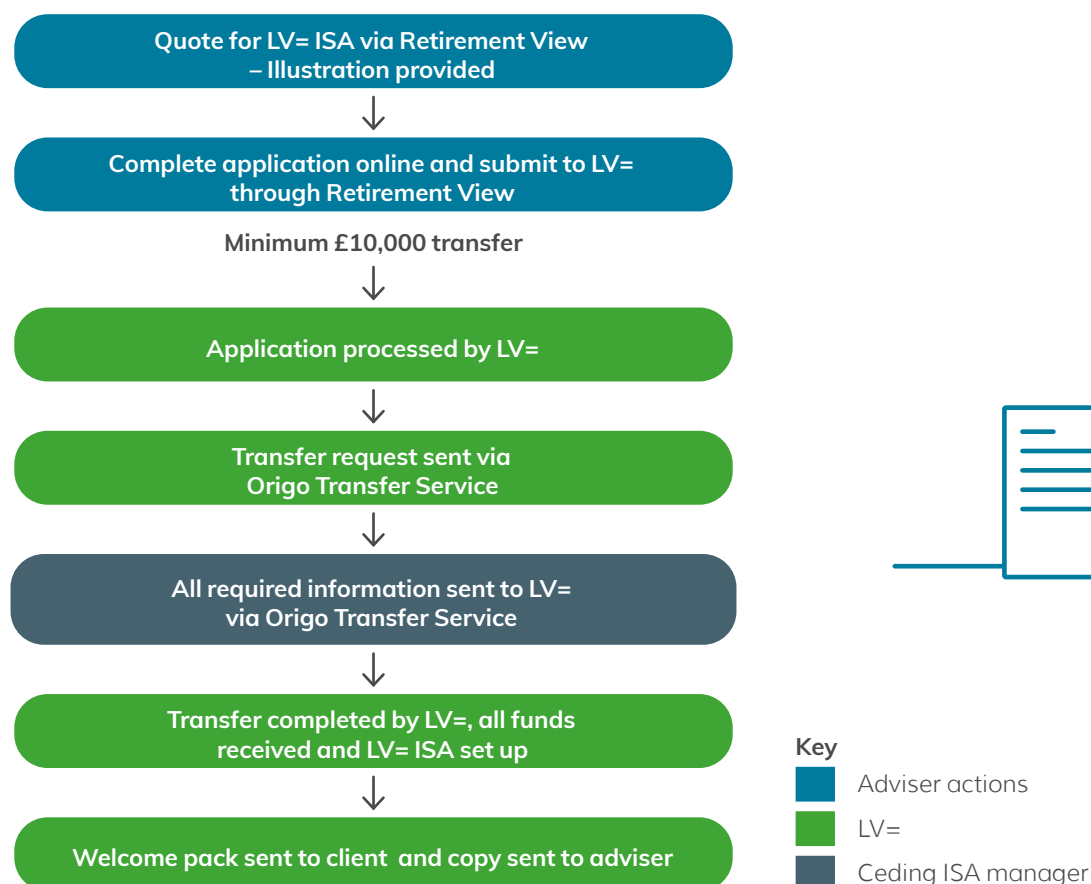


# Transferring ISA funds using the Origo Transfer Service

At LV= we have a simple process for ISA transfers, making it as easy as possible to do business with us. Transferring is straightforward with a 'no signature required' online application and automated client ID checks. We use the Origo Transfer Service, and we'll do all the work to transfer funds from the ceding ISA manager.

It is worth noting that not all providers use the Origo Transfer Service. Please see overleaf for a list of providers currently using the service.

## Here's how it works



For non-electronic transfers, a Transfer Authority Form will need to be completed at application stage and a transfer request will be made by post. Please see our **Non-electronic transfer of funds from an existing ISA** guide or talk to your Retirement Consultant for further details.

## Discover more about our new ISA

If you think the LV= ISA might be right for your clients, get in touch today. Your usual Retirement Consultant will be happy to help, or



**Call 08000 850 250**

Lines are open 8.30am – 5.30pm Monday to Friday. For textphone dial 18001 first. We will record and/or monitor your calls for training and audit purposes.



**Email [retirement@LV.com](mailto:retirement@LV.com)**



## ISA Managers using the Origo Transfer Service\*

7IM Investment Funds	Elevate- Standard Life	IFSL - Trade Union
Aberdeen Standard Fund Managers Limited	Embark Investment Services Limited	Integrated Financial Arrangements Plc (Transact)
Adaurum Limited	Equiniti (Selftrade)	Intelligent Money
Adler Financial Planning	Equiniti (Shareview)	Interactive Investor Services Ltd
Advance by Embark Platform	Evenlode Investment Management Limited	Invesco Perpetual Fund Mgrs
Advance Platform Ltd	Facet Ltd	Investec Fund Managers (UK)
Aegon Investment Solutions Ltd	Fidelity (FIL Investment Intl)	Investment Funds Direct Ltd (Pensions)
Affinity Integrated Wealth Management	First State Investments UK Ltd	Irish Life (Platform Securities)
AJ Bell Securities Ltd	Fowler Drew Limited	James Hay Partnership (Re-Reg)
Albert E Sharp (platform securities)	Franklin Templeton Funds (UK)	JO Hambro Capital Management Ltd
Alliance Trust Investments	FundRock Partners - FP WHEB Asset Management Funds	JP Morgan Asset Management UK
Alliance Trust Savings	FundRock Partners Ltd	Julius Baer (platform securities)
Allianz Global Investors UK	Fundsmith	Jupiter Unit Trust Mgrs Ltd
Amati Global Investors Limited	Fusion Wealth Ltd	Kames Capital
Amber Financial Investments Ltd	Galleon Wealth Management Ltd	Killik & Co
ANA Financial	GLG Partners	Lakeside Wealth Management Limited
Architas Multi-Manager Ltd	Hargreaves Funds	Lazard Fund Managers
Artemis Fund Managers	Hargreaves Lansdown Asset Management Ltd	Legal & General UT Mgr Ltd
Aventur Wealth	Hartley Pensions Limited	Legg Mason Funds ICVC
Aviva	Hedley & Company (Platform Securities)	LF Miton Investment Funds
Aviva Investors UK Fd Serv Ltd	Henderson Rowe (platform Securities)	LF Morant Wright Management
AXA IM UK	Host Capital Limited	LF Odey Investment Funds
Baggette & Co Wealth Management Ltd	HSBC Bank Plc	Link Financial Investments
Baillie Gifford	HSBC Gbl Asset Mgt (HSBC Inv)	Link Fund Solutions
Barclays Bank Ireland PLC	Hubwise	Liontrust Fund Partners LLP
Barclays Direct Investing Nominees Limited	Hubwise - Hubwise Direct Limited	M&G Platform Securities Limited
Barclays Investment Solutions Limited	Hubwise - The Sanlam Platform	M&G UK
Barclays Stockbrokers	Hubwise - The Synergy Wrap Platform	Maitland Institutional Services Ltd
Baring Asset Management	Huntsman Hawkes Wealth Management	Majedie Asset Management
Beaufort Financial Planning Ltd	Hurley Partners (Platform Securities)	Margetts Fund Management
BestInvest (Brokers) Ltd	IFSL	Marlborough Fund Managers
BlackRock	IFSL - Acumen Funds	Martin Currie Fund Mgmt Ltd
Bowmore (platform securities)	IFSL - AMR	MetLife
Castlefield Fund Partners Limited	IFSL - Baggettes	MI Activus
Cavendish Asset Management	IFSL - Bestinvest	MI Bespoke
Charles Stanley & Co Limited	IFSL - Brooks Macdonald	MI Brewin Dolphin
City Financial Inv Company Ltd	IFSL - Brunson	MI Charles Stanley
Close Asset Management Limited	IFSL - Equilibrium	MI Charles Stanley Investment Funds
Close Brothers AM	IFSL - Galateax	II EX MATTERLEY FUNDS
Cofunds (ISA/GIA)	IFSL - James Hambro	MI Chelverton
CPN Financial Services Ltd	IFSL - Ravenscroft	MI Discretionary
CPN Investment Management LLP	IFSL - Select	MI Downing Managed
Dartington Wealth Management	IFSL - Sinfonia	MI Downing Monthly Income
Ecclesiastical Investment Mgmt		MI Downing UK Micro Cap
		MI Hawksmoor
		MI Metropolis

MI Momentum  
 MI Somerset  
 MI Thornbridge  
 MI Twenty Four  
 Miton Trust Managers Limited  
 Mountstone (platform securities)  
 Natixis Global Asset Mgmt S.A.  
 Neptune Investment Management  
 Newton & BNY Mellon Asset Mgmt  
 NFU Mutual  
 Novia Financial  
 Nucleus  
 Nutmeg Saving and Investment Limited  
 Octopus Wealth  
 Old Mutl Gbl Investors(UK)Ltd  
 Old Mutual Wealth  
 Orbis OEIC  
 Parmenion Capital Partners LLP  
 Pershing - AFH Independent Financial Serv  
 Pershing - Boulterbowen Wealthcare  
 Pershing - Citibank  
 Pershing - Credo Capital  
 Pershing - David Booler & Co  
 Pershing - Epoch Wealth Management  
 Pershing - EQ Investors  
 Pershing - Fairstone Private Wealth  
 Pershing - Gore Brown  
 Pershing - HFM Columbus Group  
 Pershing - Holden & Partners  
 Pershing - L J Athene Investment Advisors  
 Pershing - Mattioli Woods  
 Pershing - McInroy & Wood  
 Pershing - Odey Wealth Management  
 Pershing - Phillip Capital UK Limited  
 Pershing - Shore Capital  
 Pershing - St Johns Asset Management  
 Pershing - Tilney Asset Management (IG)  
 Pershing - Tilney Investment Management ( TM)  
 Pershing - Tilney Investment Management (BI)

Pershing - Troy Asset Management  
 Pershing - VWM Wealth  
 Pershing - Wise Investments  
 Pershing Securities Limited  
 Platform One Limited  
 Praemium Administration Services Ltd (Origo)  
 Premier Fund Managers Limited  
 Premier Portfolio Managers Ltd  
 R & D Wealth Management Ltd  
 Rathbone Investment Management  
 Rathbone Unit Trust Mgmt Ltd  
 Raymond James Investment Services Ltd  
 Redmayne Bentley  
 River & Mercantile Asset Mgmt  
 RLUM (CIS) Ltd  
 Rossie House (platform securities)  
 Royal London Unit Tst Mgrs Ltd  
 Saltus Partners LLP  
 Sanlam Investments and Pensions  
 Santander Asset Management  
 Sarasin Investment Funds Ltd  
 Saunderson House (platform Securities)  
 Schroder UT Managers  
 SCM Direct  
 Seneca Investment Managers Ltd  
 Seven Investment Management LLP (Service Provider)  
 Silo (Killik Intelligent Savings)  
 Silverwood Money Management Ltd  
 Slater Investments  
 Smarter Financial Services LLP  
 Smith &Williamson Investment Services Limited  
 Standard Life Savings  
 Standard Life Wealth (platform Securities)  
 Sterling (ISA and Investment Account)  
 Stocktrade  
 Strabens Hall Ltd  
 SVM Asset Management Ltd  
 T. Bailey Fund Managers Ltd  
 Telford Mann  
 Tenet Platform Services

The Share Centre  
 The Share Centre - SI Capital Limited  
 The Share Centre - This is Money  
 Thesis Unit Trust Management Ltd (RWC)  
 Thesis Unit Trust Managers (Crux)  
 Thesis Unit Trust Mgmt Ltd  
 Thomas Heald  
 True Potential Investments  
 True Potential Investments LLP  
 UBS Asset Mgmt Funds Ltd  
 UK Private Bank (Barclays)  
 Unicorn Asset Management  
 Valu-Trac Investment Management  
 Vanguard Investments UK Ltd  
 Vanguard UK Nominees Limited  
 Viewpoint Portfolio management  
 Vitality Invest  
 Vobis Limited  
 W1 Investment Group UK Ltd  
 Wealth Management Group  
 Wealthsimple UK Ltd  
 Wealthtime Limited  
 WH Ireland Limited  
 Woodford Investment Management  
 Woolwich Plan Managers Ltd

\*List correct at time of publishing.

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