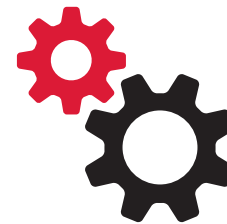


# Managing your business



Make sure actions are instructed by the dates below\* or you'll need to wait until the move is complete **(after 7 January)**

## SIPP AD-HOC INCOME REQUESTS

**Thursday**  
**13 Dec**  
**6pm**

- Ad-hoc income requests after this date will not be processed on the old platform, so please contact us to discuss alternative arrangements.
- Drawdown requests around this time **may** be processed on the new platform to enable clients to move, as planned. You will be contacted to discuss options should this situation arise.

## CREST CERTIFICATES

**Friday**  
**14 Dec**  
**10am**

- Any CREST certificates received after this date will be returned to you.
- We'll give you a self-addressed stamped envelope so that you can resubmit them once you are on the new platform.

## NEW BUSINESS APPLICATIONS

**Friday**  
**14 Dec**  
**6pm**

- New applications received by this date will be set up on the old platform, as usual.
- For applications received after this date, we'll work with you to enable you to set these up on the new platform ahead of the move.

## NEW WRAPPER SET-UPS

**Friday**  
**14 Dec**  
**6pm**

- New wrapper applications for existing clients received by this date will be set up on the old platform, as usual.
- Applications received after this date will be set up on the new platform and you won't be able to access the account until you move to the new platform.

## MODEL PORTFOLIO ACCESS

**Friday**  
**21 Dec**  
**6pm**

- This applies to rebalances, money allocation, switches, updates and new models.
- If the instruction isn't submitted by this time then you'll need to make the changes once your clients have moved to the new platform.

## DEALING

**Monday**  
**31 Dec**  
**12:30pm**

- If the instruction isn't submitted by this time then you'll need to wait until your clients have moved to the new platform.

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Both the old and new platforms will be unavailable and the phone lines will be closed from **Friday 4 January** to **Monday 7 January** inclusive. We'll let you know once the platforms are available and our lines are open.

# Important information

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\*These dates may be subject to change.  
We'll keep you informed.

Except where noted, these restrictions apply only to the old platform.

We will retain the option to turn dealing back on if a significant issue arises.

This document is intended for professional adviser use only. If you're a DFM using Ascentric we'll be in contact with you soon with the relevant information.

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