

TYE 2020 Important information for Elevate

Cut-off dates

There are important cut off dates you need to be aware of in the lead up to tax year end. Please ensure all relevant business is completed by the dates specified.

Money in	
BACS (last Day for client to send)	Thursday 26 March
CHAPS (last Day for client to send)	Thursday 2 April
Cheque (must be received by Elevate, Basingstoke)	Friday 3 April (before 12pm)
One off Direct Debit (from an active mandate)	Thursday 26 March
New Regular direct debit (mandate must be received by)	Thursday 19 March
Immediate Crystallisation BACS (last Day for client/transferring scheme to send)	Wednesday 25 March
Immediate Crystallisation Cheque (must be received by Elevate, Basingstoke)	Wednesday 25 March

Drawdown	
BCE (PCLS Only)	Thursday 2 April (before 4pm)
BCE (PCLS & Income)	Thursday 19 March
BCE (PCLS via CHAPS but income to Elevate Cash) *Payment date cannot be selected to pay between 2 & 5 April	Friday 13 March
One off income payment	Thursday 19 March
Regular Income Strategy (to start 5 April)	Thursday 19 March

All of the above are subject to there being sufficient liquidity and all bank verification requirements being met.

GIA/ISA/Elevate Cash Money Out	
BACS payment	Thursday 26 March
CHAPS payment	Friday 3 April (before 11am)
One Stop Payment	Monday 23 March (before 11am)

All of the above are subject to there being sufficient liquidity and all bank verification requirements being met.

The one stop payment deadline is based on Elevate receiving confirmation of any disinvestment trades from the Investment Manager and based on daily trading funds only. If funds trade less frequently then this needs to be taken into account.

Change of Ownership

Change of Ownership between Accounts (to be keyed and form received)

Thursday 2 April (before 2pm)

GIA or Elevate Cash to ISA cash movement

Friday 3 April (before 4pm)

All of the above are subject to there being sufficient liquidity and all bank verification requirements being met.

Bank account, payment and address information

All Postal Deliveries to:

Standard Life – Elevate
PO BOX 6877
Basingstoke
RG24 4RT

Elevate Bank Account:

Elevate Portfolio Services Limited
(with plan number as payment reference)

Sort Code: **16 04 00**

Acc No: **31276146**

(Cheques made payable to Elevate Portfolio Services Limited
with plan number written on the back of the cheque)

Address to be used for hand deliveries/Courier/GND & Recorded Deliveries

Standard Life-Elevate
Winterthur House
Winterthur Way
Basingstoke
RG21 6SZ