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# Elevate help guide: View the status of a transfer

**Standard Life**

There's a lot to look forward to

# Check the status of transfers from other providers onto Elevate

## What you will see

You can check progress at any time – see when a transfer has completed, money has been received and when it has been invested.

Dashboard New Client Existing Clients Business Mgmt Research Model Portfolios Literature Help Admin

Search By Investment Custom Search Work In Progress Work Submitted Transactions In Progress Completed Transactions Link Accounts

Anon Client 106571 (EL1125810)  New Search

Summary Portfolio New Work Cash Account Account Holders **Transactions** Reports & Documents Charges & Remunerations

Deposits / Withdrawals **Transfers** Deals Asset Movement Investments Corporate Actions Natural Income

Completed Select view: Elevate View

st ID	Account Name	Account Number	Manager/Custodian	Requested Date	External Account Number	Transfer Type	Direction	Status	
Anon Client 106571	EL1125810-003	Scottish Equitable plc	07-Mar-11	UPI0009376915	Cash	IN	Completed	<a href="#">Detail</a>	
Anon Client 106571	EL1125810-004	Scottish Equitable plc	10-Mar-11	UPI0009339186	Cash	IN	Completed	<a href="#">Detail</a>	
Anon Client 106571	EL1125810-003	Scottish Equitable plc	29-Mar-11	UPI0009339186	Cash	IN	Completed	<a href="#">Detail</a>	

Summary Portfolio New Work Cash Account Account Holders

Deposits / Withdrawals **Transfers** Deals Asset Movement Inve

Status: Open

st ID	Account Name	Account Number	Manager/Custodian	Requested Date	External Account Number	Transfer Type	Direction	Status	
Anon Client 106571	EL1125810-003	Scottish Equitable plc	07-Mar-11	UPI0009376915	Cash	IN	Completed	<a href="#">Detail</a>	
Anon Client 106571	EL1125810-004	Scottish Equitable plc	10-Mar-11	UPI0009339186	Cash	IN	Completed	<a href="#">Detail</a>	
Anon Client 106571	EL1125810-003	Scottish Equitable plc	29-Mar-11	UPI0009339186	Cash	IN	Completed	<a href="#">Detail</a>	

Audit Log and Status

Date	Action
Requested at 09-05-2013 13:25:42	New Status: Pending
Product-Level Status Changed by AXA Wealth on 13/05/2013 12:34:52	New Status: Pending - Received

## What you will need to do

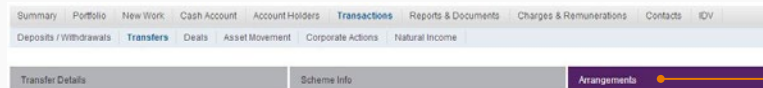
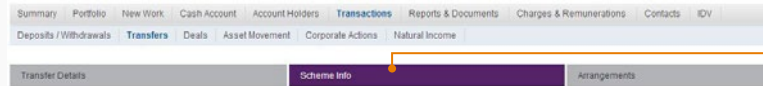
1. Go to your client's account.
2. Go to **Transactions > Transfers**.
3. You can filter transfers for a specific wrapper in **Select view**.
4. View any completed transfers by amending the **Status**.
5. Find the transfer you want to check and click **Detail**.
6. Scroll down the page to **Audit Log and Status** to see details of any monies received, including the amount and payment method.

## Notes

2. You'll see any transfers that are open, including details of the product wrapper, ceding transfer information and the transfer type (either Cash or Re-registration).
5. You'll see details of any cash being transferred or funds to be re-registered.

# For the Elevate PIA

## What you will see



## What you will need to do

7. For information on the percentage of standard lifetime allowance, any earmarking order or protection details for block transfers, go to **Scheme Info**.
8. For more information on crystallised transfers, go to **Arrangements**.

## Notes

8. For example if the Money Purchase Annual Allowance applies or the GAD maximum income for any capped drawdown transfers.

## Get to know us better

We hope you've got a good insight into our platform and the potential benefits it can bring to you and your firm.

If there is anything more you want to know, please contact us.

### Call us on 0345 600 2399

Our lines are open 8am to 6pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

### Email us at [Elevate\\_Enquiries@standardlife.com](mailto:Elevate_Enquiries@standardlife.com)

Please be aware that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

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