

Adding New Money - Timeline Platform

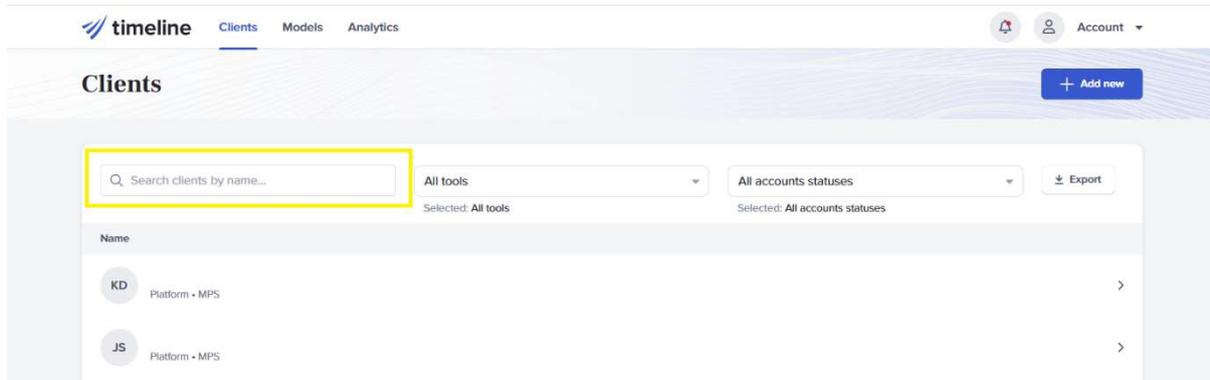
February 2026

timeline.co

For Financial Advisers Only

Locate the Client

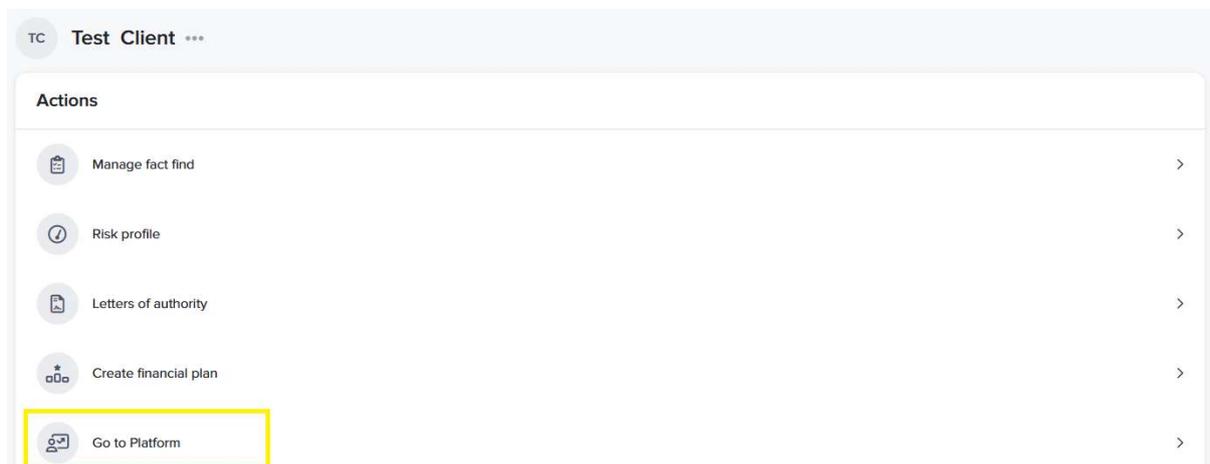
- Login to the Timeline App
- Use the search bar to locate the Client
- Select the client



Go to Platform

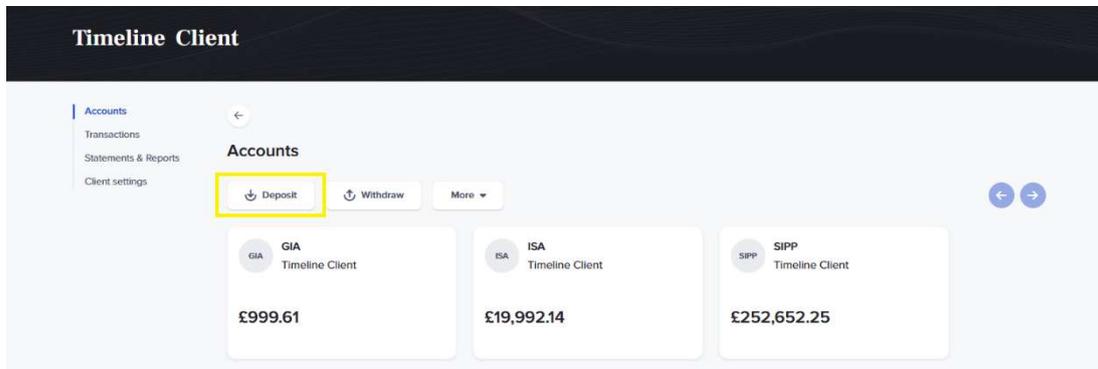
- From the client profile, select 'Go to platform'

This will take you into the client's platform view, where all accounts and holdings are displayed.



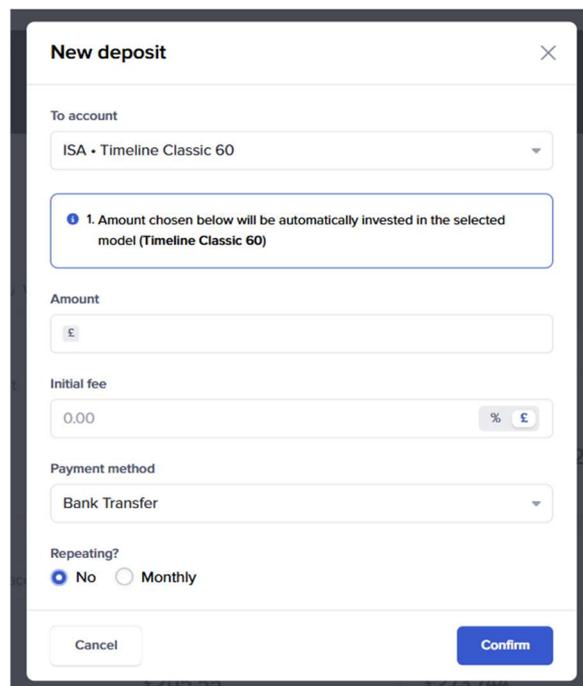
Start the deposit journey

- Select 'Deposit'



Enter deposit details

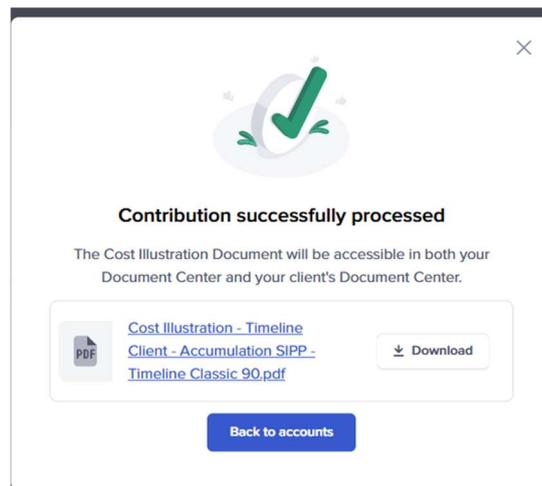
- On the 'Deposit' screen:
 - Select the wrapper you are adding money to (e.g. ISA, GIA, SIPP) and choose the relevant pot
 - Model or Flex
 - Enter the amount
 - Confirm whether an adviser fee applies
 - Select the payment method:
 - Bank Transfer
 - Direct Debit
 - Confirm whether you would like to repeat the payment
 - Once you're happy with the details entered, select 'Confirm'



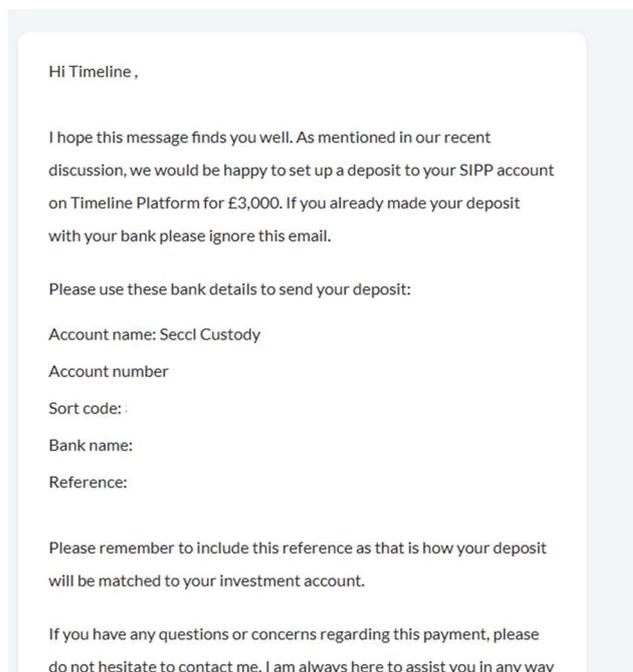
What happens next?

Once confirmed:

- A cost illustration will be automatically generated, this can be:
 - Downloaded immediately
 - Accessed later in the 'Document Centre'
 - The client can access this within the Client Portal



- The client will receive an email confirming the deposit details and where to send the money



- If Direct Debit is selected and the client hasn't set up a Direct Debit before, they'll receive an email asking them to approve the mandate in the Portal, followed by an advance notice confirming the payment. If DDI is selected and the client already has an active Direct Debit, the payment will be taken automatically, and they'll receive an advance notice confirming this.



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