

# GIA and ISA Journey – Timeline Platform

February 2026

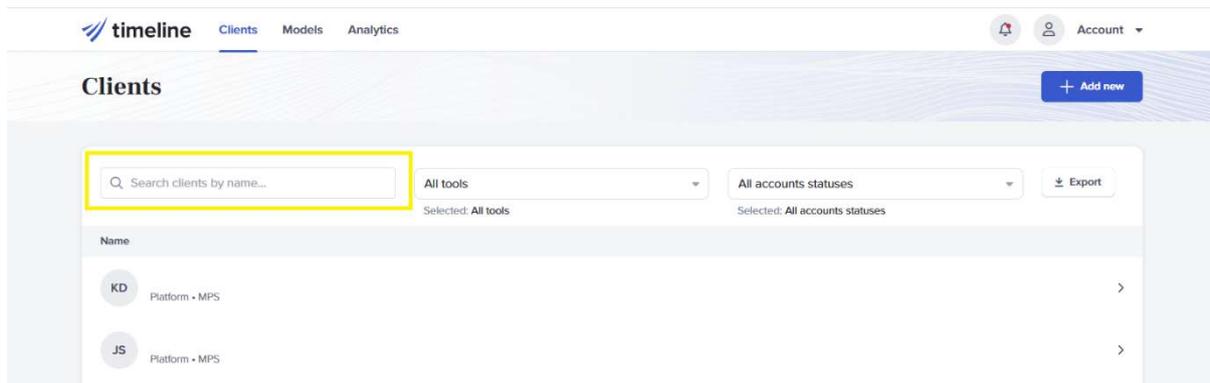
[timeline.co](https://timeline.co)

For Financial Advisers Only

## A guide to how to complete the GIA to ISA transfer using the Timeline Platform

# Locate the Client

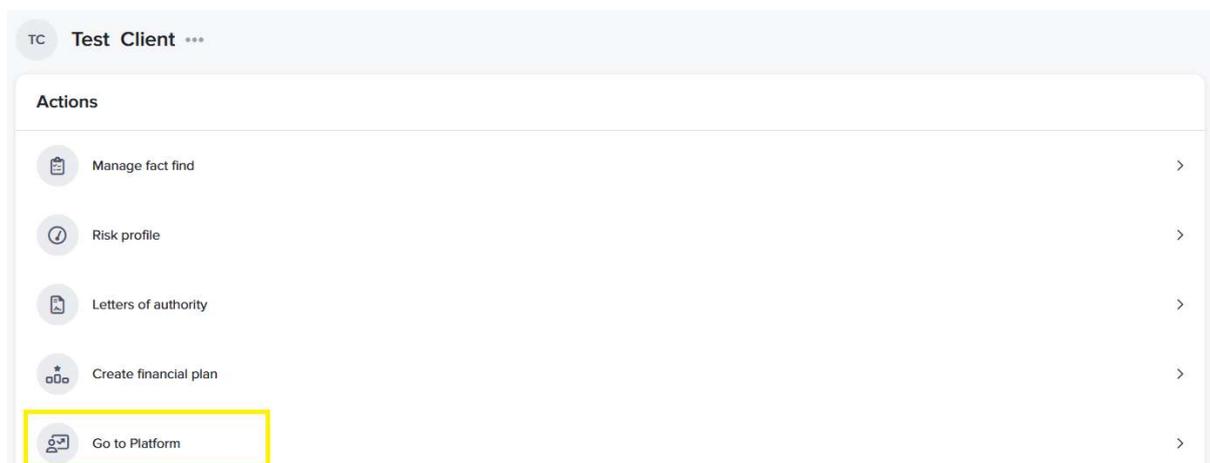
- Login to the Timeline App
- Use the search bar to locate the Client
- Select the client



# Go to Platform

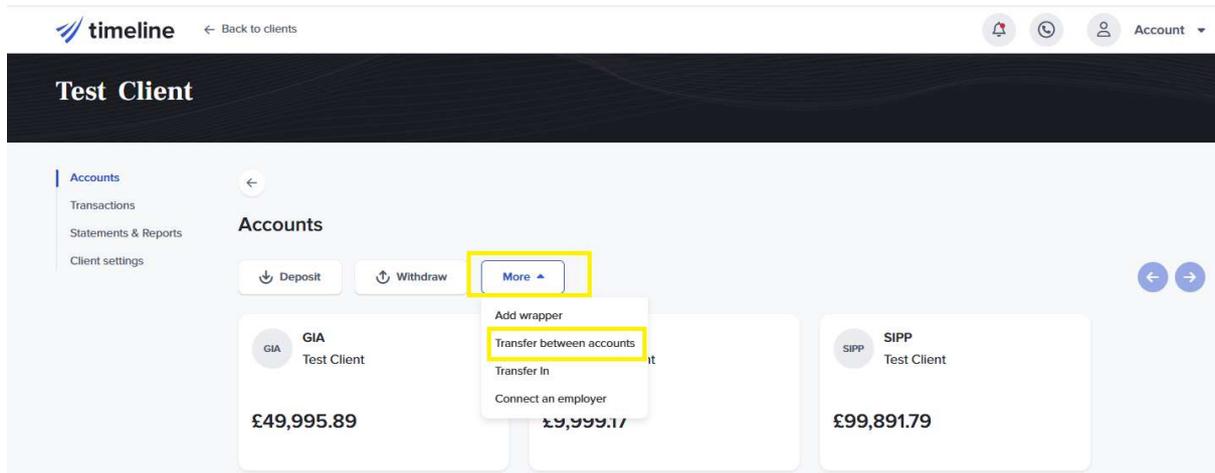
- From the client profile, select 'Go to platform'

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



# Open the Transfer Journey

- Select 'More'
- Choose 'Transfer between accounts'



## Select accounts

- Source account: Select the client's GIA
- Receiving account: Select the client's ISA
- Enter the transfer amount
- Select 'Confirm Transfer'

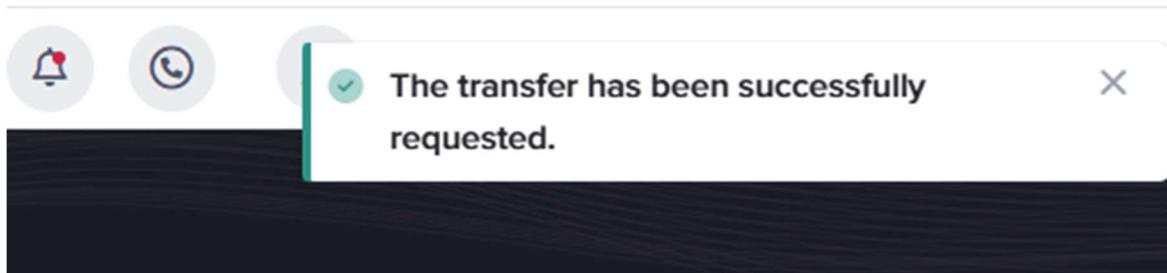
Ensuring the ISA has sufficient allowance.

The dialog box is titled 'Transfer between accounts'. It contains a note: 'Note: We apply a 10% buffer when selling to raise cash for this transfer. 1. Assets are sold down and then repurchased; dealing fees apply. 2. Market movements can affect sale and purchase outcomes.' Below the note, there are two dropdown menus: 'Source account' (selected: GIA • Timeline Classic (No REITs) 50) and 'Destination account' (selected: ISA • Timeline Classic (No REITs) 60). Below the dropdowns, there is a text input field for 'Amount' with the value '£ 20,000'. At the bottom, there are two buttons: 'Cancel' and 'Confirm transfer'.

# What happens next?

Once the instruction has been submitted:

- A confirmation message will appear in the top right-hand corner of the screen
- The transfer will then be visible under 'Transactions' to be able to track the progress.



How the transfer completes:

- If a sale is required:
  - Investments will be sold from the Gia
  - The transfer will move across once the sales have been completed and cash has settled.
- If cash is already available:
  - The transfer will typically complete on the same day





**Email** support@timeline.co

**Office** 70 Gracechurch St  
4th Floor  
London  
EC3V 0HR

**timeline.co**

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