

# TAX YEAR END **KEY DATES**



**27<sup>th</sup>**  
March

 **11:30am**

Last date to instruct a Bed and ISA transfer to guarantee completion within the 2025–2026 tax year. The last time an adviser can request a single taxable income payment for the 25/26 tax year is **11:30 on the 27th of March**. This payment will be made to reach the client on the 2nd of April. Any income payments requested on or before the 22nd of March will be made on the 28th of March.

**1<sup>st</sup>**  
April

Recommended deadline for ISA applications to be submitted and funds cleared to avoid allocation issues.

**2<sup>nd</sup>**  
April

 **16:00pm**

Contributions received after 16:00 may initially be allocated to the 2026–2027 tax year. This will require additional work to be recorded as a 2025–2026 contribution. This may take up to 15 working days from 7 April.

**5<sup>th</sup>**  
April

 **23:59pm**

Final deadline for payments to count toward the 2025–2026 tax year.

Tax Year End Made Simpler

