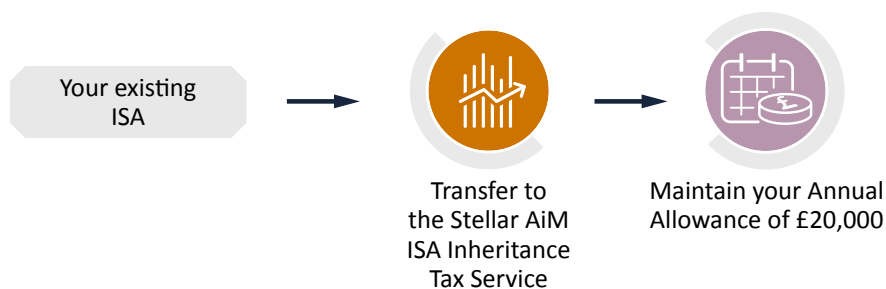
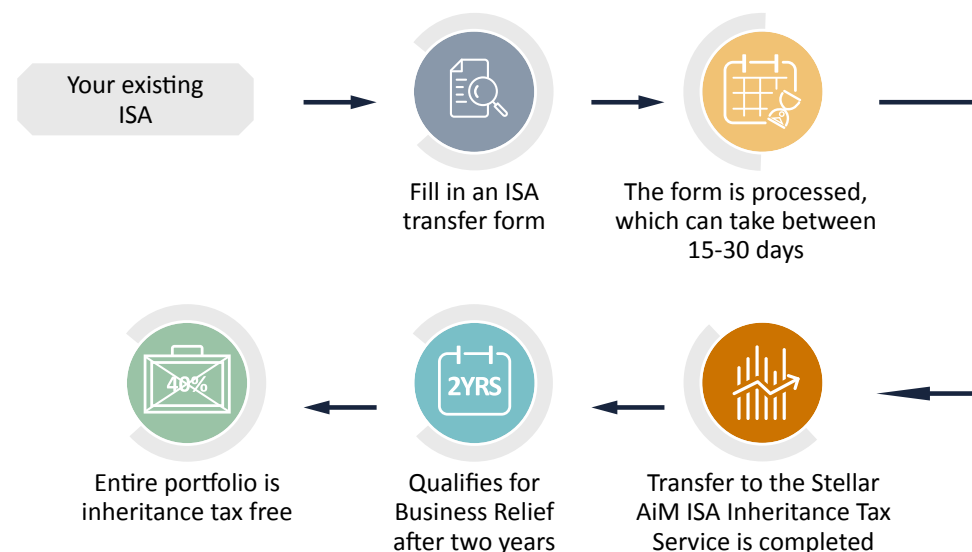


# Transferring an ISA into an AIM Portfolio



## Making an ISA Transfer

- ★ You can transfer your ISA from one provider to another at any time
- ★ You can transfer your savings to a different type of ISA or to the same type of ISA
- ★ If you want to transfer capital you've invested in an ISA during the current year, you must transfer all of it
- ★ For capital you invested in previous years, you can choose to transfer all or part of your savings
- ★ A transfer does not count as 'paying in' and therefore does not affect your Annual Allowance of £20,000



## Benefits To You

- ★ Transferring your existing ISA into the Stellar AiM ISA Inheritance Tax Service only requires you to fill out an ISA transfer form, and the rest will be handled by us
- ★ Transferring an existing ISA to us can benefit you instantly by exposing your investment to companies quoted on AIM
- ★ The Stellar AiM Inheritance Tax Service will also qualify for Business Relief making your ISA inheritance tax free after two years

[stellar-am.com](http://stellar-am.com)

## Important Information

Stellar Asset Management Limited does not offer investment or tax advice or make recommendations regarding investments. Prospective investors should ensure that they read the product literature and fully understand the risk factors before making any investment decision. This document is dated July 2020 and is exempt from section 21 of the Financial Services and Markets Act 2000 and is not required to be and has not been approved for the purposes of the section because it is only being communicated to selected Investment Professionals (as defined under article 19 of the Financial Services and Markets Act 2000 (Financial Promotion) Order 2005). If this document is forwarded to any other person, you must ensure that you have taken responsibility for the document under the financial promotions rules and identified yourself as the issuer. Stellar Asset Management Limited of Kendal House, 1 Conduit Street, London W1S 2XA is authorised and regulated by the Financial Conduct Authority.