



*THE*  
**PLATFORM**  
*DNA*

# **CLIENT CONTRIBUTIONS**

**Guidance and Checklist**

## Overview

Client contributions can be set up on the platform, whether they are one-off or regular contributions.

## Audience

This document is intended for **Advisers** and **Account Providers** and **Support Staff**, including those with the **Client Manager** role.

## Requirements

Contributions on behalf of a client can be set up on the platform by either the:

- Appointed **Adviser** of the client; or
- Someone with the **Account Trustee** role of the Account Provider

## Steps

1. Select client, navigate to the required account and select **Personal Contributions**
2. Navigate to the **Add a Contribution** section and follow on screen instructions for a regular/one off contribution. If it is an ISA, upload copy of contribution form.
3. For confirmation of the bank details and client's individual reference, navigate to the **Deposit Funds** section.

## Contact Us

If you would like to learn more, please get in touch.

### Call us on **0330 123 9830**

Lines are open 8.30am to 5pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

### Email us at [investing@tavistockplatform.com](mailto:investing@tavistockplatform.com)

We aim to provide an initial response to your query on the same working day.

### Address

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