The smart investment platform

Transferring an ISA

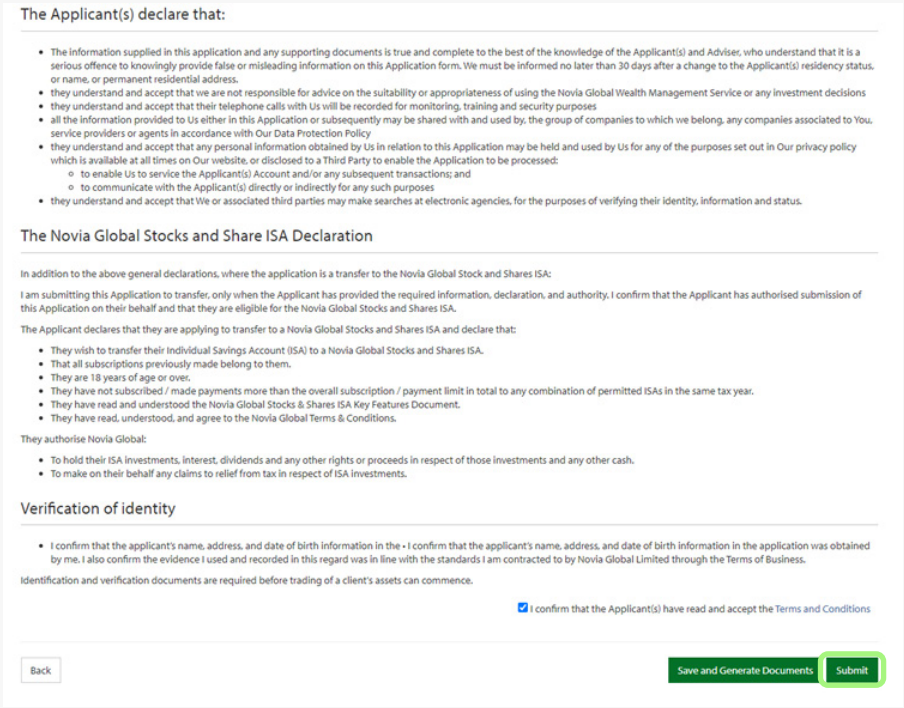
User Guide

ISA Transfer

Registering a new ISA application is a straightforward process. As part of this process, we have introduced multi-factor authentication to the platform to eliminate the need for any signed paperwork. This guide will detail the steps required by your client upon submissions of an ISA transfer request.

Step 1

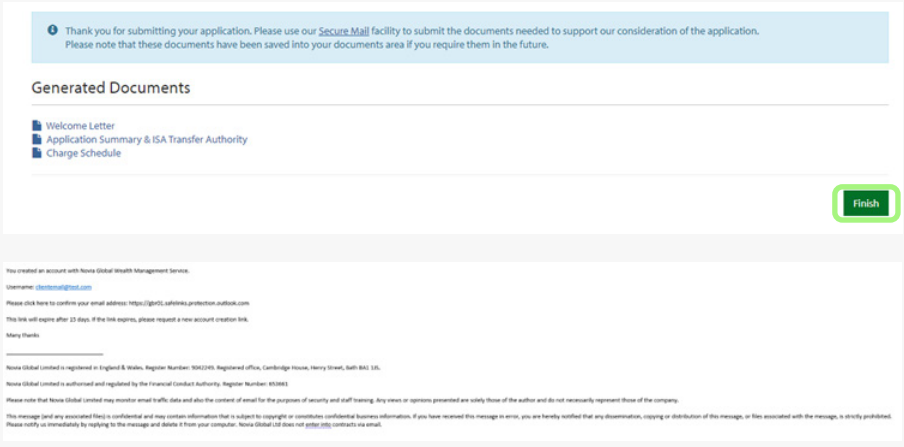
Proceed through the new business journey and register a new client in the usual way. If you would like further help on how to register a new client, please refer to our user guide which is available here. Please ensure that you have obtained the applicants National Insurance number as this will be required as part of the process. Our ISA data capture form which lists all of the required information to process an ISA application is available to download here.



Step 2

Tick to confirm application details are correct and accept the declaration.

After submitting the case, the relevant documents are generated. These documents can be opened and printed. The application summary can be signed by client and retained by the adviser if required but it does not need to be submitted to Novia Global.



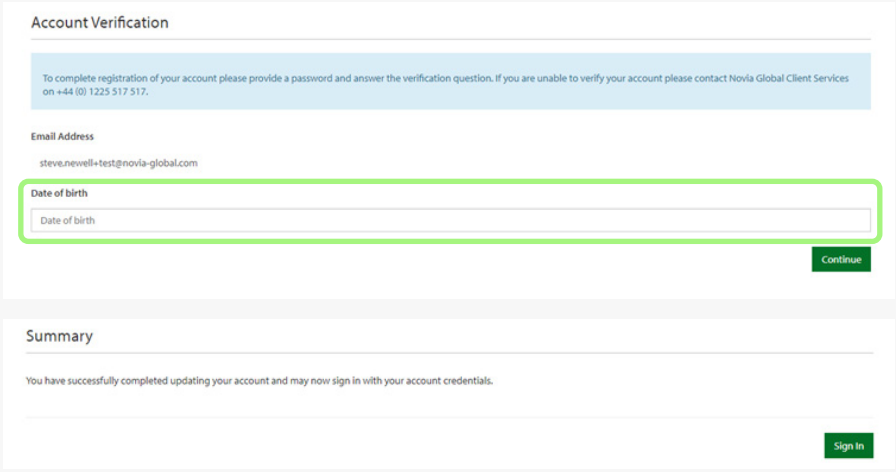
Step 3

After reviewing the documents, click "finish" to complete the process.

Upon clicking "finish" an email is automatically generated and sent to the client email address that you added as part of the new business journey.

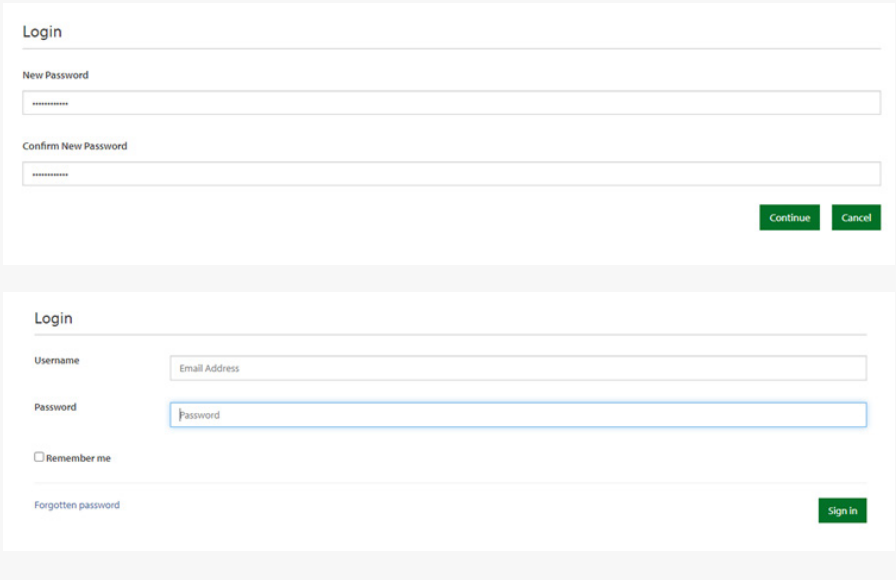
This begins the multi-factor authentication process.

Multi-Factor Authentication



Step 1

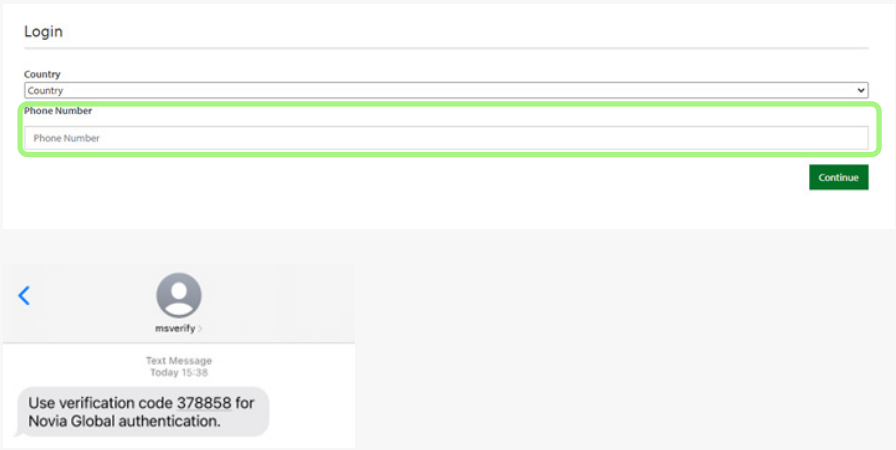
To begin this process, the client will need to click the link in the email and then enter their date of birth.



Step 2

Once the correct date of birth has been entered, the client will then be able to set their own password.

Then, the client will then be able to begin the login process.



Step 3

After entering their new password, they will need to add a mobile phone number. This number will be used to send a verification code.

The verification code will arrive immediately.

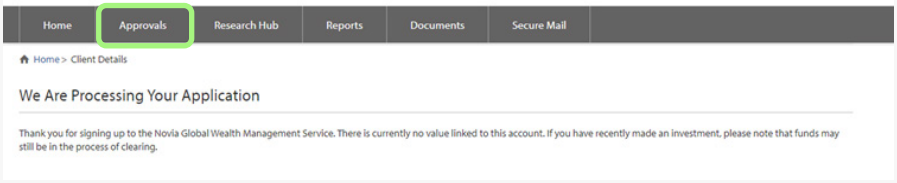
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Step 4

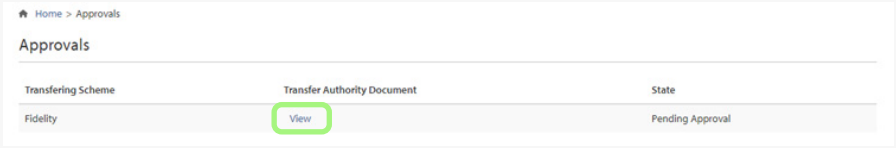
The client will then need to enter the correct code in order to access the Client Portal.

The Client Portal



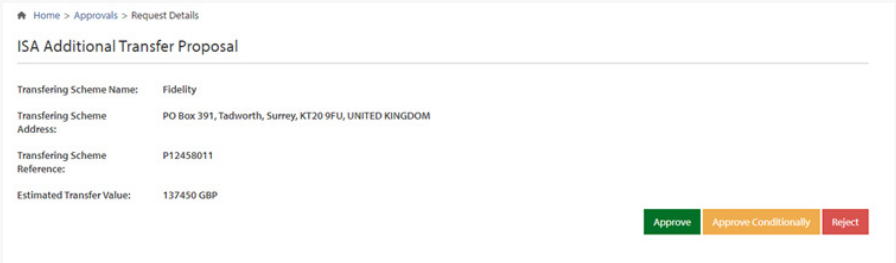
Step 1

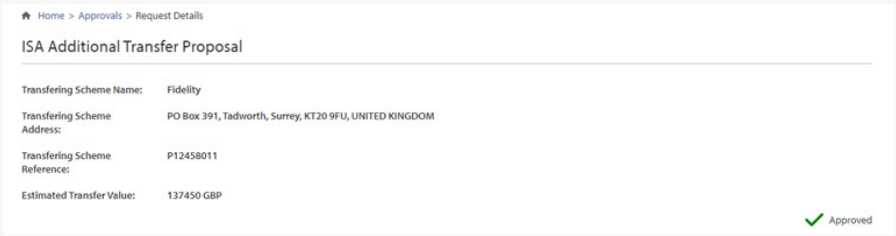
This is the home screen that the client will initially be presented with. To approve the ISA transfer, the client will need to click "approvals" then a list of all submitted transfers will be displayed.



Step 2

Click "view" to see further information on each transfer.

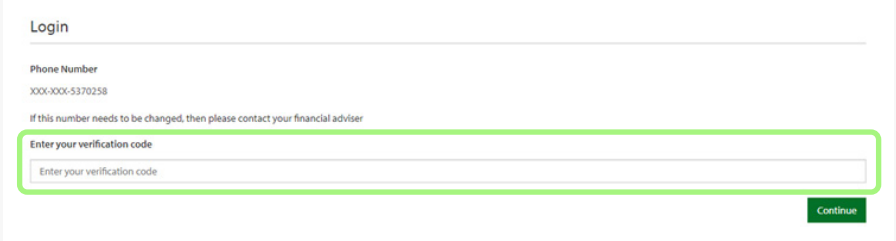




Step 3

A detailed summary of transfer will then be displayed.

Upon clicking "approve" the case will then be completed and our client services team will begin the ISA transfer process.



Next time the client logs into the Client Portal, a verification code will be sent to the phone number that was previously entered.

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