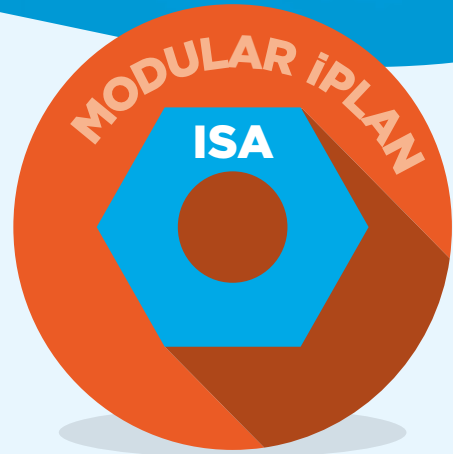


# BOLT ON AN ISA TO THE MODULAR iPLAN

IF A CLIENT ALREADY HOLDS A MODULAR iSIPP, CONSOLIDATE THEIR INVESTMENTS IN ONE PLACE.

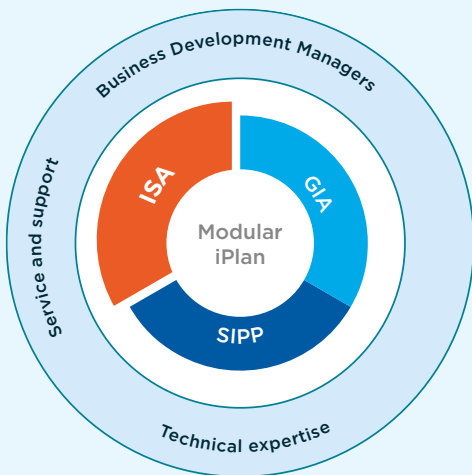
## THREE REASONS TO BOLT ON AN ISA TO THE MODULAR iPLAN

- 1** No set up cost<sup>1</sup>
- 2** Consolidate your client's investments onto our platform and the annual administration charge could be waived<sup>2</sup>
- 3** Diverse range of investment solutions available via the Investment Centre, Managed Portfolio Panel, Stockbroker service, plus access to whole of market investments.



**ISA allowance  
2024/25 £20,000**

Apply at: [www.jameshay.co.uk/ISA](http://www.jameshay.co.uk/ISA)



Once the [Modular iSIPP](#) is in place, the [Modular ISA](#) and [Modular GIA](#) can be added with no set up cost. Refer to the [relevant charges schedules within our literature section](#) for a full breakdown of charges.

These three elements amount to a complete retirement wealth planning solution. Consolidate your client's assets onto one platform for ease and flexibility.

<sup>1</sup> There is no set up charge to open a Modular ISA where a Modular iSIPP is already in place.

<sup>2</sup> The annual administration charge (applied to the Modular iSIPP) is waived where a minimum balance of £200,000 is held in Cash Panel deposit accounts, Investment Centre Funds (including funds held in the Managed Portfolio Panel), and cash held in product bank accounts including property cash accounts, if applicable, across all Modular iPlan products.