



Take control of your finances,  
see everything in one place  
and make the right decisions



If you need help with any aspect of Wealth Platform or just have a question, please call your financial adviser.

## How to top-up your Fusion Wealth ISA or General Investment Account

Please contact your financial adviser for guidance before investing funds.

- 1 Log in and select 'Assets' on the left-hand side.**
- 2 Select the relevant investment, for example 'ISA (shares) Fusion Wealth'.**
- 3 Select 'Add Money,' and read the important information.**

Please note: You may be asked to confirm your eligibility to invest in an ISA for the current tax year, it is important that you read this information.
- 4 Choose how much you would like to top-up by (minimum £100).**

Please note: You will see the details of your investment on this page, including your remaining ISA allowance for the current tax year. Wealth Platform only logs investments held on the Fusion Wealth Platform, so if you have other ISAs elsewhere please take these into account.
- 5 When prompted, select a payment method.**

Please note: If you select 'BACS' you will need to complete this via your online banking.
- 6 Enter your details if paying by debit card and click 'Make Payment'.**
- 7 You will then be able to view your payment confirmation message.**

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