

Below are FAQs relating to the recent Jarvis notification.

## General

Question	Response
I have received an email from Jarvis Investment Management Ltd <a href="mailto:impress@quadiant-impress.uk">impress@quadiant-impress.uk</a> , titled “### Important information account your account ###”, is this a Scam?	<p>Please be assured this is not a Scam, we have emailed you about important changes to your account(s) with a PDF attached letter.</p> <p>To ensure this communication is processed as efficiently as possible, we have used a 3rd party company, Quadient.</p> <p>You will receive further communications in the coming months regarding the changes to your account, and these will be sent from the same email address.</p>

## Accounts Moving to interactive investor

### General and pre-transfer FAQ

Question	Response
Why is my account moving from Jarvis to interactive investor?	<p>Your account is moving because Jarvis has taken the decision to close its services and has agreed to transfer its retail customers from its execution-only business to the investment platform interactive investor (<a href="http://www.ii.co.uk">www.ii.co.uk</a>).</p> <p>As one of the UK’s largest platforms, we believe interactive investor will be a great home for you and your investments. We have really valued your support, and our focus now is to ensure your transition is a smooth one.</p>
Why are some customers staying on Jarvis?	<p>A majority of customers are moving to interactive investor because they are a leading provider of execution only services in the UK.</p> <p>Those remaining with us will have the options available to them communicated by us. If you are not migrating to interactive investor, please</p>

	see the “Accounts Remaining with Jarvis” FAQ section below.
When will my account move?	Your account is expected to move to interactive investor in the summer; we’ll keep you updated on specific dates in the coming weeks.
Do I need to do anything?	<p>You do not need to take any immediate action but to stay informed you should ensure your contact details are up to date.</p> <p>This will allow us to keep you informed throughout the whole process.</p> <p>Furthermore, once migrated, this will allow you to access your interactive investor account online or through the interactive investor app. If you don’t update your email on your account, you won’t be able to log in when you move over.</p> <p>You should also ensure your mobile phone number is correct in your account, as interactive investor will need it to help you reset your password on their platform.</p> <p>You can check, add or update details by logging in to your account with us.</p>
Who is interactive investor?	<p>interactive investor has been helping people achieve their financial goals for 30 years. The award-winning investment platform is already home to over 450,000 customers, with £70 billion of assets under administration. Above all, they’re known for offering great value, choice and service.</p> <p>Once your account has moved over, you’ll benefit from:</p> <ul style="list-style-type: none"> <li>• A streamlined platform accessible online, via the interactive investor app or by phone</li> <li>• One of the widest choices of investments on the market, with solutions for all types of investors</li> </ul>

	<ul style="list-style-type: none"> <li>A suite of exclusive research tools and features, along with expert insights from their editorial team</li> </ul>
Will my money and investments be safe with interactive investor?	Yes, your money will still be safe. Like Jarvis, interactive investor is authorised and regulated by the Financial Conduct Authority, and your money and investments will continue to be protected by the Financial Services Compensation Scheme.
What does this mean for Jarvis services before my account moves to interactive investor?	<p>For now, it's business as usual at Jarvis.</p> <p>We are focused on ensuring a smooth transfer of your account and a successful future for you with interactive investor.</p>
What happens if I don't want to move to interactive investor and would prefer to stay on Jarvis?	<p>If you do not wish for your account to be transferred to interactive investor, please let us know via email: <a href="mailto:clientservices@jarvisim.co.uk">clientservices@jarvisim.co.uk</a>.</p> <p>You will need to make alternative arrangements for your Jarvis account prior to contacting us.</p>
Can I transfer to a new provider before my account moves over?	<p>For ISA/JISA account holders: You can organise a full ISA/JISA transfer to another ISA/JISA provider to maintain your remaining ISA allowance. You will need to decide on your new provider and request an account transfer form from them.</p> <p>For Trading Account holders: You will need to arrange a full transfer of your holdings to another provider. You will need to decide on your new provider and request an account transfer form from them.</p>
Can I still open an account with Jarvis?	<p>While you cannot open an account with us now, you can join interactive investor directly at <a href="http://www.ii.co.uk/join-us-today">www.ii.co.uk/join-us-today</a>.</p> <p>If you try to open an account through X-O.co.uk or shareddealactive.co.uk, we'll redirect you to interactive investor so you can start right away.</p>

### Getting set-up on interactive investor

How will I log in to my account on interactive investor?	<p>interactive investor will send you details to help get you online just ahead of the move. To log in, you will need to have an up-to-date email address on your Jarvis account. You should also ensure your mobile phone number is correct, as interactive investor will need it to help you reset your password on its platform.</p> <p>You can check, add or update details by logging in to your Jarvis account.</p>
What happens if I don't provide an email address?	<p>Your account will still move to interactive investor, but you will not be able to log in online until you provide an email address.</p> <p>You can still access your account by contacting interactive investor's UK-based Customer Support team. Please note there are extra charges for trading over the phone.</p>
Can I access information from my old Jarvis account on the interactive investor platform?	<p>interactive investor will move up to five years' history of your Jarvis statements, consolidated tax certificates and contract notes onto its platform, so you can view these for future reference.</p>
Will the Jarvis website remain accessible once I have been moved to interactive investor?	<p>Once your account has moved to interactive investor you will no longer be able to log in via a Jarvis website. The Jarvis websites will remain accessible for those customers who have not moved to interactive investor.</p>
What if I already have an interactive investor account?	<p>interactive investor will link your accounts moving from us to your existing account as part of the move, wherever possible. You will have just one login and pay just one service plan fee afterwards.</p>
I have a complaint raised with Jarvis. Will this continue to be handled by Jarvis or handed to interactive investor once my account moves over?	<p>Any complaint you have raised with us ahead of the move will continue to be handled by Jarvis as the provider you made the complaint against.</p>

Will my W8-Ben move over to interactive investor?	Any valid W-8BEN forms will be shared with interactive investor.
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## ISA FAQs

Will my ISA remain flexible on interactive investor?	Flexibility is not currently transferable to other providers due to the complicated nature of processing. Therefore, if your account is to be migrated, it will be done as a standard ISA.
If I've contributed to an ISA in the 2025/26 tax year, can I continue contributing with interactive investor?	Yes, you can continue to contribute to your ISA with interactive investor – as long as you haven't reached the ISA tax allowance of £20,000.
Does interactive investor offer Junior ISAs?	Yes, interactive investor offers Junior ISAs, alongside your own Stocks & Shares ISA and Trading Account.

## Pricing FAQs

What are the account charges on interactive investor?	<p>interactive investor uses a low flat-fee model for their account charges. This means you pay a simple and predictable monthly fee.</p> <p>They have a number of service plans available. Which one you will start on will depend on the types of accounts you have and the total value of your portfolio. You can switch plans from the first time you log in, if you wish.</p> <p>You can find out more about interactive investor's fees and charges <a href="#">here</a>.</p> <p>More details about interactive investor's pricing structure will be included in future communications.</p>
What are the trading commission charges on interactive investor?	<p>You can find out more about interactive investor's fees and charges <a href="#">here</a>.</p> <p>More details about interactive investor's pricing structure will be included in future communications.</p>

## Account FAQs

I have a joint account; are there any changes I need to make?	<p>At interactive investor, each party on your joint account will need their own email address to access your account.</p> <p>Ahead of the move, it will help if you add an individual email address and mobile phone number for each person to your account.</p> <p>After the move, interactive investor will arrange for both of you to have your own personal login details.</p>
I have multiple accounts at Jarvis. How will the move affect me?	<p>After the move, all your accounts will be linked at interactive investor under a single service plan, and you will have one login ID to access them all.</p> <p>Before the move, it is important that you make sure we have the same email address and mobile phone registered for you in the contact details section of each of your accounts with us.</p>

## Accounts Remaining with Jarvis

### General and pre-transfer FAQ

Question	Response
Why is my account not moving to interactive investor?	<p>There were several criteria for accounts to be deemed in scope as part of the migration. Your account does not meet all of the criteria and will therefore remain with us whilst we support your transfer to an alternative provider.</p> <p>You will need to make alternative arrangements for your account; see 'Do I need to do anything'.</p>
Can I transfer my account to interactive investor?	Yes, you may be able to transfer to interactive investor, but you will need to contact interactive investor directly and arrange for the transfer to happen.

Do I need to do anything?	<p>Yes, you need to act on your account, the options available are;</p> <ul style="list-style-type: none"> <li>• Transfer your assets and cash balance to an alternative provider</li> <li>• Sell all assets held where possible and withdraw the cash proceeds</li> <li>• Withdraw or re-register assets into certificated format where possible</li> <li>• Gift your assets to the share donation charity, ShareGift. <a href="http://www.sharegift.org">www.sharegift.org</a></li> </ul> <p>You need to take action. Additional communications will be sent in the coming months, reminding you of your options, so please ensure your contact details on your account are correct.</p>
Can you advise who I can transfer my account to?	<p>We are an execution only stockbroker and therefore are unable to offer advice. Whilst your account does not meet interactive investor's migration criteria, you may be able to transfer to interactive investor by contacting them directly.</p> <p>There are also comparison websites available, such as <a href="http://www.money.co.uk">www.money.co.uk</a>, that can help you make an informed decision.</p>
Are my money and investments still safe with Jarvis?	<p>Yes, Jarvis is authorised and regulated by the Financial Conduct Authority and your money and investments will continue to be protected by the Financial Services Compensation Scheme.</p>
What does this mean for Jarvis services before my account moves?	<p>For now, it's business as usual at Jarvis.</p> <p>We are focused on ensuring we provide the best service we can whilst your account remains with us.</p>
Can I transfer to a different provider?	<p>Yes, as detailed below;</p> <p><b>For ISA/JISA Account holders</b> - You can organise a full ISA/JISA transfer to another ISA/JISA provider</p>

	<p>to maintain your ISA allowance accrued. You will need to decide on your new provider and request an account transfer form from them.</p> <p><b>For Trading Account holders</b> - You will need to arrange a full transfer of your holdings to another provider. You will need to decide on your new provider and request an account transfer form from them.</p> <p><b>For SIPP Account holders</b> - You will need to arrange a full transfer of your holdings to another SIPP administrator / provider. You will need to decide on your new SIPP administrator / provider and request an account transfer form from them.</p>
Can I still open an account with Jarvis?	No, as of 11 <sup>th</sup> April 2025, we will not be accepting any new accounts.

#### ISA FAQs

Will my ISA remain flexible on interactive investor?	Flexibility is not currently transferable to other providers due to the complicated nature of processing. Therefore, if your account is to be migrated, it will be done as a standard ISA.
If I've subscribed to an ISA in the 2025/26 tax year, can I continue to subscribe into it with a different provider?	Yes, you can. As for transferring to any new ISA provider in a tax year, the act of transferring does not affect your subscription limit of £20,000.

#### Pricing FAQs

Will I be charged anything to transfer to a new provider?	No, all fees relating to transactions removing holdings / accounts from Jarvis, and associated brands, are to be waived.
Will I be charged to withdraw my money/holdings?	No, all fees relating to transactions removing holdings / accounts from Jarvis, and associated brands, are to be waived.