



For financial advisers only

How to produce an unused ISA allowance report using Report Zone

Aegon Retirement Choices



Producing an unused ISA allowance report

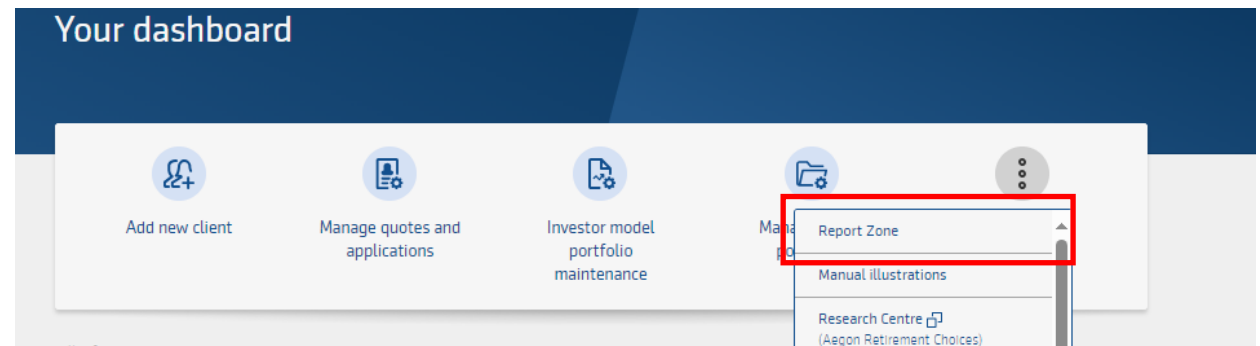
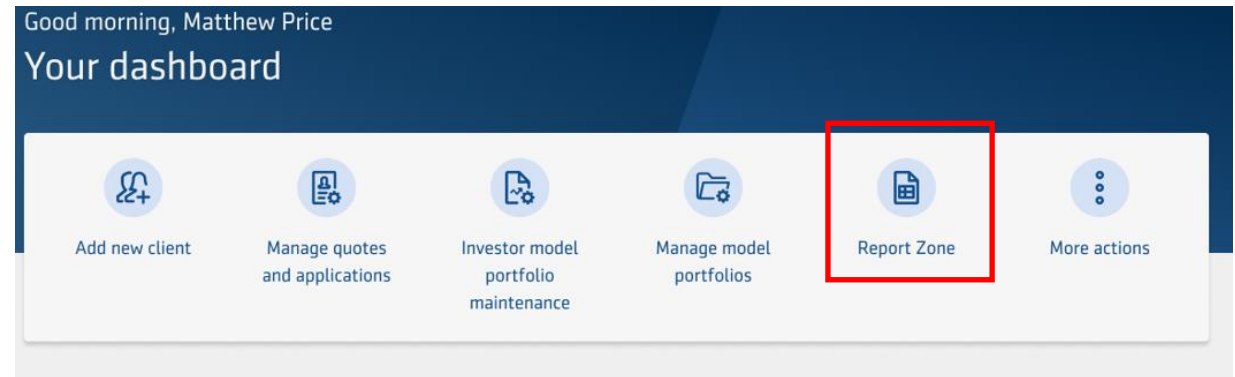
This guide explains how to produce an unused ISA allowance report for your Aegon Retirement Choices (ARC) clients using Report Zone.

For further support when using ARC or One Retirement, see our [online support](#).

The screens we show are for demonstration purposes only.

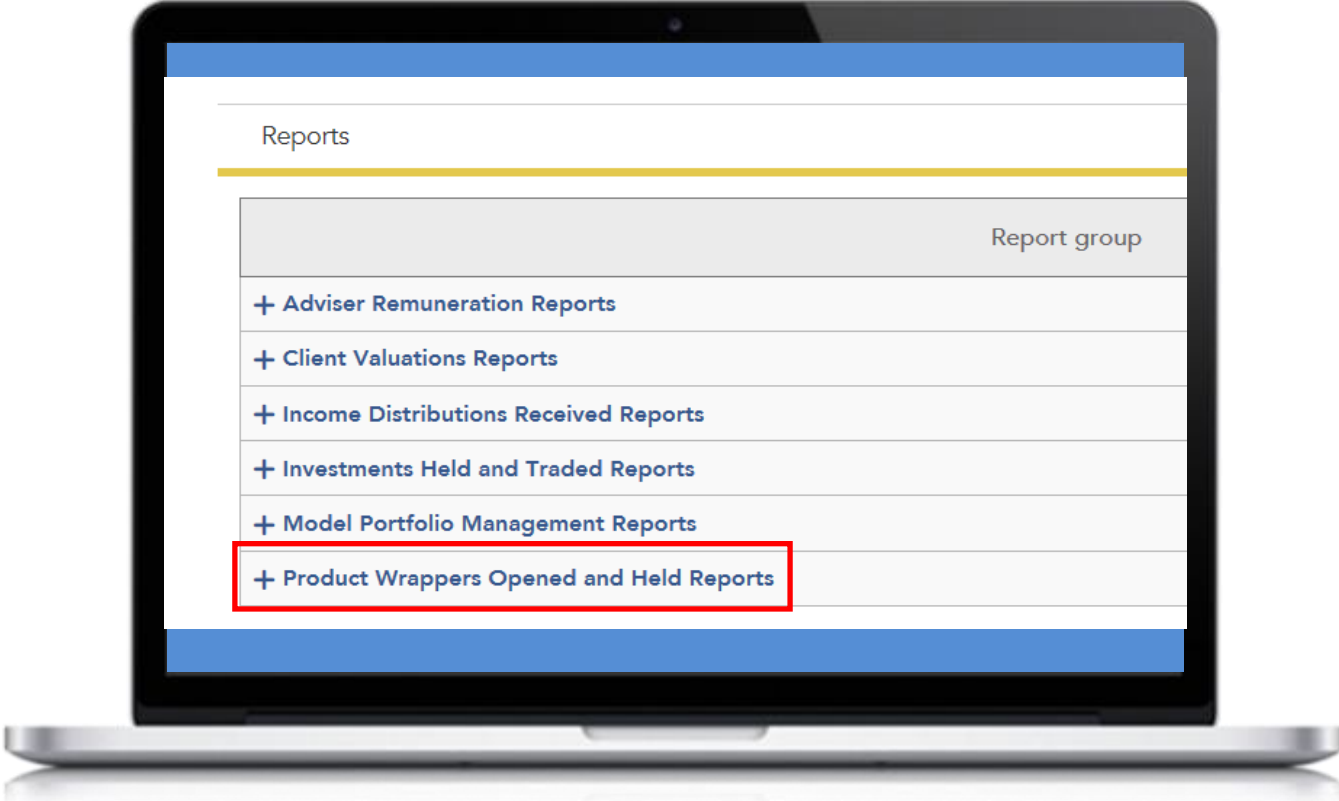
Producing an unused ISA allowance report – Log in

- Log in to your account, where you'll land on **Your dashboard**.
- Select **Report Zone** from the top panel displaying the different options, to take you directly to the tool.
- As **Your dashboard** is tailored to you and the permissions you have, you may need to select **More actions** to see the **Report Zone** link.



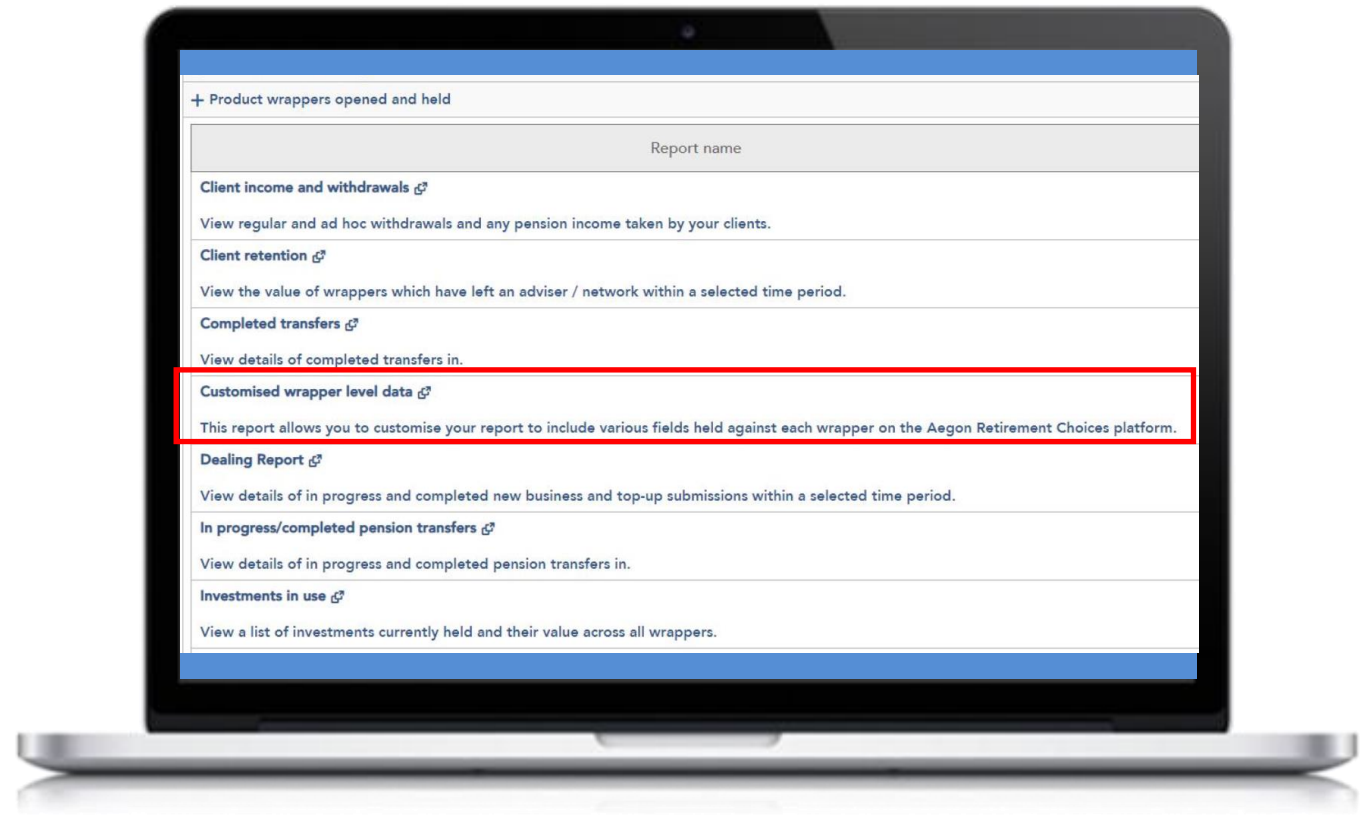
Producing an unused ISA allowance report – Reports

Select **Product Wrappers Opened and Held Reports**.



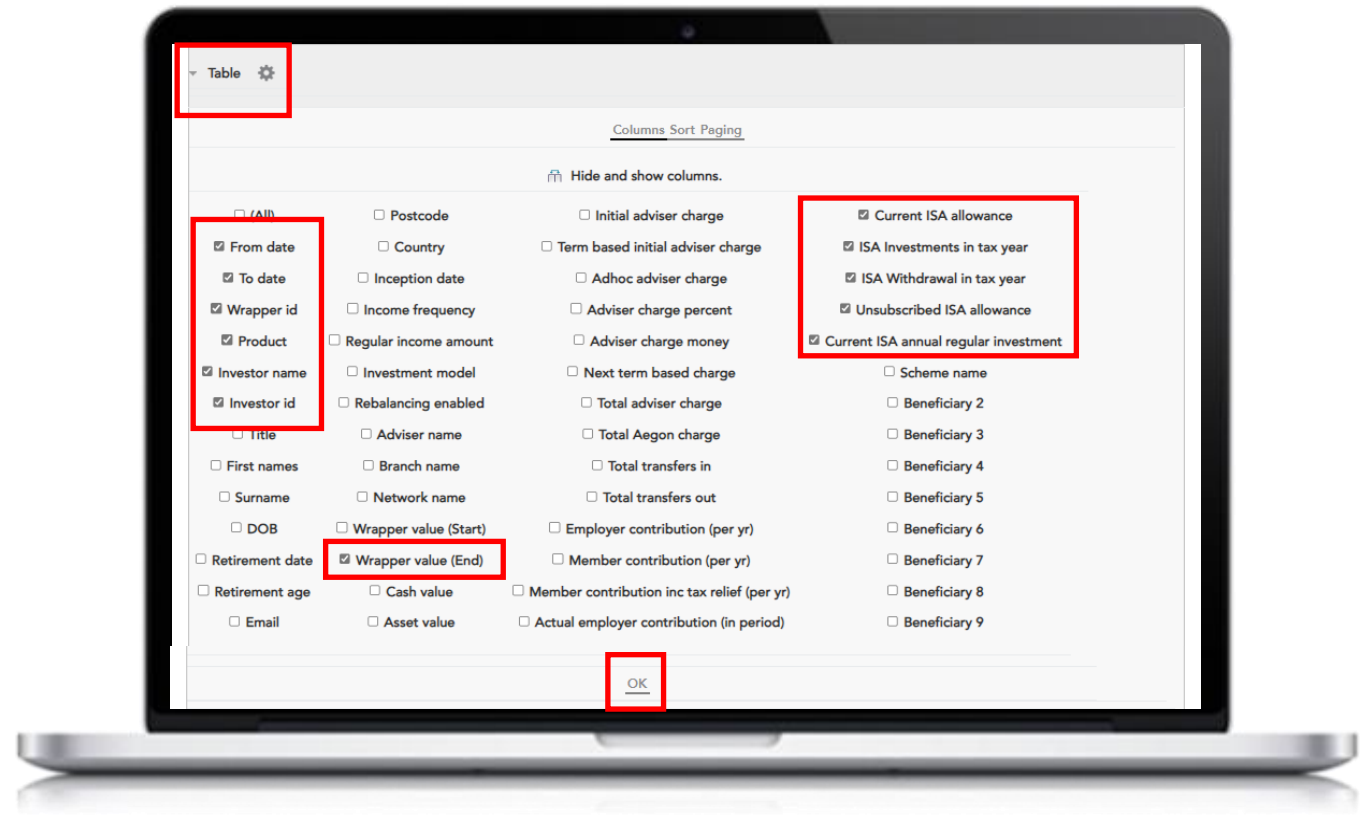
Producing an unused ISA allowance report – Select reports

Select **Customised wrapper level data**.



Producing an unused ISA allowance report – Customise

- Select the **cog icon next to Table** to expand the options.
- Tailor your report to include the ISA data and any other information you require.
- Select **OK**.
- Then we'll ask you to choose your date range and you'll select **Get data**.



Producing an unused ISA allowance report – Report display

We'll then display your report.

If you want to export your report to Excel, select the Excel icon at the bottom of the page – you can then filter it as you need.



From date	To date	Wrapper id	Product	Investor name	Investor id	ISA Investments in tax year	Unsubscribed ISA allowance	Current ISA annual regular investment
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00
01/12/2019	01/12/2020	XXXXXX	ISA Stocks & Shares	XXXXXX	XXXXX	£0.00	£15,240.00	£0.00



[aegon.co.uk](https://www.aegon.co.uk)

 [@aegonuk](https://twitter.com/aegonuk)

 [Aegon UK](https://www.facebook.com/AegonUK)