



ISA Maintenance & Processing

About the course

The purpose of this course is to provide the skills required to process and manage Individual Savings Accounts within the Figaro system. The course is based on everyday scenarios and includes a hands-on element using a generic FIGARO system.

Course Objectives

On completing the course, the successful delegate will be able to:

- Maintain Products & Subscription Limits
- Process Applications
- Process Subscriptions
- Transfer In an ISA from another Plan Manager
- Transfer Out an ISA to another Plan Manager
- Manage the process of closing ISA accounts
- Enquire on the status of an ISA
- Utilise the Administration Reports

Who should attend the course?

- This course is designed for ISA clerks who already possess a basic knowledge of FIGARO Back Office.
- It is suitable for both new users and those experienced users who have learnt on the job and want to fill gaps in their knowledge.

Course Prerequisites

- Delegates should have passed General Introduction and Figaro Overview – Back & Middle Offices.

Course Content

Part 1: Maintenance & Subscription

- Maintain Products & Subscription Limits
- Incept an ISA
- Subscribe Cash

Part 2: Transfers, Closures & Monitoring

- Transfer In an ISA from another Plan Manager
- Transfer Out an ISA to another Plan Manager
- Close an ISA account
- Monitoring Reports

Course Details

- Duration: 4 hours
- Course booking reference: **FIGARO188r**

Course Venues

Courses can be held at our fully equipped training facilities in London (details below) or delivered on your premises

- JHC LLP, 3 More London Riverside, London SE1 2AQ

Contacting JHC Plc

For information on booking this course please contact our training department:

- Ph. 0207 367 6534
- Email: training@jhc.co.uk