

ISA transfer in form

Office use only
Account number

Personal details

Title	<input type="text"/>
First name(s)	<input type="text"/>
Middle name(s)	<input type="text"/>
Surname	<input type="text"/>
Previous name	<input type="text"/>
Date of birth	<input type="text"/>
Address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/>
Nationality	<input type="text"/>
National Insurance number	<input type="text"/>
Telephone number	<input type="text"/>
Mobile telephone number	<input type="text"/>
Email address	<input type="text"/>

Information about the ISA you want to transfer

Bank or Building Society	<input type="text"/>
Address	<input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/>
Sort code	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>
Account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Roll number (if applicable)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

I wish to transfer All Part

If you're only transferring part of your ISA, please state how much you wish to transfer £

Have you subscribed to your ISA in the current tax year? Yes No

If yes, and you're only transferring part of your ISA, do you want to include the subscription from the current tax year? Yes No

If you only wish to transfer your subscriptions from the current tax year, please tick If so, how much?

I instruct my current ISA provider to (please tick one):

Only go ahead with the transfer after the maturity date or at the end of the notice period for the ISA being transferred, whichever is applicable. I confirm that the funds will be available to transfer within 30 days; or

Carry out the transfer as soon as possible and I will accept any loss of interest or charges which may be applied as a result of this, subject to the terms and conditions of the ISA

Your Authority

I authorise my existing ISA provider to transfer the ISA (account number above) to Tipton & Coseley Building Society. I authorise my existing ISA provider to provide Tipton & Coseley Building Society with any information about the cash ISA and to accept any instructions from them relating to the cash ISA being transferred.

Signed

Date

Transfer acceptance for office use only

V1.001 30 August 2019

Tipton & Coseley Building Society is willing to accept this ISA transfer in line with the customer's instructions above, as long as the following conditions are met:

1. The transfer proceeds are made up of cash deposits only

2. We must receive the transfer proceeds no later than:

/ /

3. Where the customer has shown they want to transfer subscriptions from the current tax year, these must not be more than:

£

4. For the purpose of the transfer of the ISA wrapper under the ISA regulations, the date shown here will be the transfer date.

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Date form received in branch:

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