

ISA transfer in form

Office use only
Account number

Personal details

Title

First name(s)

Middle name(s)

Surname

Previous name

Date of birth

Address

Postcode

Nationality

National Insurance number

Telephone number

Mobile telephone number

Email address

Information about the ISA you want to transfer

Bank or Building Society

Address

Postcode

Sort code - -

Account number

Roll number (if applicable)

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 26 April 2021

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.

/ /

Date form received in branch:

/ /