

# 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"/> / <input type="text"/> / <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"/>
Account number	<input type="text"/>
Roll number (if applicable)	<input type="text"/>

How much of your ISA do you want to transfer? All  Part

What is the estimated amount you are transferring? £

Does this amount include current tax years subscriptions? Yes  No  If yes, how much? £

**Please note, the amount in your ISA account representing current tax years subscriptions can only be transferred in whole and not part.**

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

I hold a Power of Attorney/Court of Protection and sign on behalf of the Account holder.

Once you have completed this form, please post it to our head office: Tipton & Coseley Building Society, 70 Owen Street, Tipton, West Midlands, DY4 8HG.

Transfer acceptance for office use only

V1.006 17 April 2026

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:

/   /