Stocks and Shares ISA Provider



Transfer Authority Form

Section 1: Existing Stocks and Shares ISA provider	
To: The Manager	
Name & Address	
Postonia	
Postcode	
Section 2: Your personal details and details of your o	current Stocks and Shares ISA
Title (Mr/Miss/Ms/Mrs/Mx)	Address - Please enter your full permanent address
THE (VIII) VIIIS) VIIS) VIIS)	Address Trease effect your fail permanent address
Surname	
Surfame	
First name	
First name	Postcode
Any other name(s)	National Insurance Number
Any other name(s)	National insulance number
Data of hinth (DD/MMM/0000)	Frieting Charles and Charles ICA account number
Date of birth (DD/MM/YYYY)	Existing Stocks and Shares ISA account number
	Cash/Lifetime ISA receiving the transfer proceeds, the transfer will be
 undertaken subject to the terms and conditions applying to your Sto Some Stocks and Shares ISA products do not allow only part of a 	· · · · · · · · · · · · · · · · · · ·
transfer is undertaken, e.g. when deciding which investments are	
Your existing ISA provider may need you to give them specific info	ormation before the transfer can go ahead.
There may be outstanding fees to pay before the transfer goes al	
If you are not sure what conditions apply please check with your exist	sting Stocks and Shares ISA provider before completing this form.
Are you transferring into a Cash ISA or a Lifetime ISA?	Cash Lifetime
If you answered Cash, please go straight to question 3	
If you answered Lifetime, please answer questions 2 and 3	
2. Is the Stocks and Shares ISA you are transferring from, a Lifetime	e ISA? Yes No
If you answered no, and you are transferring from a non-Lifetime	
ISA, this will be treated as a Lifetime ISA subscription. You can or £4,000 annual Lifetime ISA subscription limit.	nly transfer up to the
3. Do you wish to transfer all or part of your existing Stocks and Sha	ares ISA? All Part
If you answered 'All' to Q3 this will result in all investments currer cash currently held in the ISA, will be transfered to Skipton Buildin	ntly held being sold. The sale proceeds, together with any uninvested ng Society in its entirety.
4. Have you subscribed to this Stocks and Shares ISA in this current	t tax year? Yes No
If you have answered 'Yes' to Q4 please confirm the amount you	have subscribed this year. Amount £
If you have answered 'All' to Q3 please go directly to Section 4 Cu	ustomer Authorisation.
If you have answered 'Part' to Q3 please go directly to Section 3 b	pelow.

Continued overleaf

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Section 3a: Partial Transfer Details				
Please note you do not need to complete this	s section if you are transferring your Stocks	and Shares ISA in full.		
5. If you answered 'Yes' to Q4 above do you want to transfer your current tax year ISA subscription (this would involve selling any investments made with the subscription from the current tax year)? Yes No				
Please note that the amount in your account	representing current tax year subscriptions	can only be transferred in whole and not in part.		
If you only want to transfer your subscription OR	ons from the current tax year, tick here			
	scriptions from previous tax years, tick here			
OR		_		
	bscriptions from previous tax years (as well above) tick here and provide sale instruction			
7. Stocks, Shares and / or Funds that you wis	sh to sell			
	by your existing Stocks and Shares ISA prov be contacted by your existing ISA provider t			
Please use the box below to give instructions to your current Stocks and Shares ISA provider with regard to what specific value or Tax Year(s) should be transferred and/or what investments should be realised to meet the transfer.				
If needed, please list all investments that y	you hold with the above ISA provider that you on Building Society. Alternatively, you may pro	u wish to sell and transfer the proceeds		
Description of Investment	Investment Indicator e.g. ISIN, Sedol, Cuip etc. (if known)	Number or Value of Stocks, Shares, Units or specify "All" to sell the entire holding		
		_		
Section 3b: Uninvested cash to be	transferred			
Please say how much of your uninvested cas Stocks and Shares ISA you want to transfer OR	£ , .			
If you want to transfer all of your uninvested of	cash balance, tick here			
Section 4: Customer Authorisation				
Please arrange to transfer my Stocks and Sha to Skipton Building Society as detailed below Skipton Building Society Investment Operations	r: Form and provide identificati Skipton Building Society. If th Lifetime ISA with Skipton Bui	In all cases, you will need to complete the appropriate Transfer Application Form and provide identification if you are not an existing customer with Skipton Building Society. If the funds are to be credited to an existing Cash/Lifetime ISA with Skipton Building Society, please quote the Skipton account number you wish to transfer to.		
The Bailey, Skipton North Yorkshire	Existing Skipton account nun	nbers		
BD23 1DN				
	L			

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Continued overleaf

Section 5: ISA Declarations

I authorise my existing ISA provider as specified above to sell investments and transfer the ISA in cash (account number above) to Skipton Building Society.

I authorise my existing ISA provider to provide Skipton Building Society with any information, written or non-written, concerning the Stocks and Shares ISA and to accept any instruction from them relating to the Stocks and Shares ISA being transferred.

Where I must give notice to close or transfer part of the existing Stocks and Shares ISA, or the existing Stocks and Shares ISA contains an investment which is designed and intended to be held for full term and has yet to reach redemption, I instruct my existing ISA provider to either: (tick the appropriate box)

to either. (tick the appropriate box)	
Wait for the full notice period to end, or wait until redemption (whi before going ahead with this transfer.	chever is relevant)
OR	
2. Depending on the terms and conditions, carry out the transfer as accept any consequential loss of income, capital or charges that	
Customer Signature	
Date of signature (DD/MM/YY)	
Transfer acceptance	
Skipton Building Society are willing to accept this ISA transfer in line been met.	with the instructions above, as long as the following conditions have
• The transfer proceeds are made up of cash deposits only	
• We must receive the transfer proceeds no later than 30 days from t	
• Where you want to transfer subscriptions from the current tax year,	these must not be more than the amount shown in Q4 overleaf.
• Please note we do not accept residual income payments	will all the date about about will be the transfer date
For the purposes of the transfer of the ISA wrapper under the ISA reg	Julations, the date snown above will be the transier date.
Please return this form with your application form to the address to Customer Delivery, Skipton Building Society, Skipton, North Yorksh	
Financial Advice use only	
Financial Adviser Name:	Case Handler Name:
Is this an advised case? Yes No	Date sent to Customer Delivery (DD/MM/YY):
Case Handler Staff Number:	



Call 0345 850 1722





Skipton Building Society is a member of the Building Societies Association. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, under registration number 153706, for accepting deposits, advising on and arranging mortgages and providing Restricted financial advice. Principal Office, The Bailey, Skipton, North Yorkshire BD23 1DN.

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