

# ISA Application Form Checklist

## Have you...

- Fully completed Section 1
- Completed Section 2 specifying your opening investment and supplied the relevant cheque/passbook where applicable
- Provided information on how you would like your interest to be paid
- Provided relevant identification if you are a new customer to the Society (please see the reverse of the application form for details)
- If transferring existing ISAs held elsewhere, have you included the correct details of your current provider and completed the Transfer Authority Form so we can notify them of your request
- Signed and dated the form(s)

You should now be ready to return your application form.

**To return your application form(s) and any other relevant material, please use the Freepost envelope.**

If you have any queries, please call our ISA helpline on **08458 501722\***

Principal Office, The Bailey,  
Skipton, North Yorkshire BD23 1DN  
Telephone: 08458 501700\*  
[skipton.co.uk](http://skipton.co.uk)



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