

Transfer Authority for your existing Cash ISA provider



Section 1: Existing ISA provider name and address

Name

Address

Postcode

Section 2: Details of the Cash ISA

Title (Mr, Miss, Mrs) Surname

First name Any other initial(s)

Address - Please enter your full permanent address. Please note that we are unable to accept c/o addresses and P.O. Box numbers.

House/Flat number Street

Town County Postcode

Date of birth (DD/MM/YYYY)
 / /

National Insurance Number Existing ISA number Existing Sort Code

The terms and conditions of some ISA products do not allow only part of an ISA to be transferred. Your existing provider may need you to give them specific information before the transfer can go ahead. Please check with your existing ISA provider if you are not sure about this.

1. Do you wish to close your current Cash ISA and transfer the full amount? Yes No

2. Have you subscribed to this Cash ISA in this current tax year? Yes No

If **Yes**, please enter the amount paid in this tax year:

£

3. If you answered **No** to **Question 1** please enter the total amount you want to transfer: £

Do you want to transfer current tax year subscriptions in Q2 above as part of this transfer? Yes No

Please note that the amount in your account representing current tax year subscriptions can only be transferred in whole and not part.

4. I instruct my existing provider to wait until the notice period has expired or following the maturity before the transfer takes place. Yes No

If **No**, please check with your existing provider regarding the terms and conditions of your account as charges/loss of interest may occur.

Section 3: Customer Authorisation

Please arrange to transfer my Cash ISA to Skipton Building Society as detailed below:

Skipton Building Society, Customer Delivery, The Bailey, Skipton, North Yorkshire BD23 1DN

Continued overleaf

Section 3: Customer Authorisation (continued)

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 ISA with Skipton Building Society, please quote your account number.

Existing ISA number

I understand that this provides you with the appropriate authority to transfer the above Cash ISA to Skipton Building Society as soon as possible.

I authorise my existing ISA provider (as specified) to transfer the ISA to Skipton Building Society.

I authorise my existing ISA provider to provide Skipton Building Society with any new information, about the Cash ISA and to accept my instructions from them relating to the Cash ISA being transferred.

Customer Signature

Date (DD/MM/YY)

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Transfer acceptance

We are willing to accept this ISA transfer in line with the customers instructions above, as long as the following conditions have been met.

- The transfer proceeds are made up of cash deposits only
- We must receive the transfer proceeds no later than 30 days from the date on this form.
- Where the customer wants to transfer subscriptions from the current tax year, these must not be more than the amount shown in question 2 above.

For the purposes of the transfer of the ISA wrapper under the ISA regulations, the date shown above will be the transfer date.

Please return this form with your application/transfer form in order for us to arrange the transfer of funds.

Call in **branch** | Talk to us today **0345 850 1700** | Visit **skipton.co.uk**



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