

Cash ISA Transfer Authority Form

Customer Details (to be completed by the ISA investor)

Title First name(s) Surname

Permanent residential address

Postcode:

Contact Telephone Number

Date of Birth National Insurance Number (if applicable)

Information about the ISA to be transferred (to be completed by the ISA investor)

Name of existing ISA Manager

Address of existing ISA Manager

Account Number of ISA to be transferred

1. **Do you want to close your current cash ISA and transfer all the balance, including the accrued interest?**
 Yes No *If you are requesting a partial transfer, please check with your existing ISA Manager that this is possible*
2. **Have you subscribed to your current cash ISA in the current tax year?**
 Yes No

If you have answered YES to Q1, please ignore Q3 & Q4

3. **If you answered YES to Q2: Do you want to transfer current tax year subscriptions as part of this transfer?**
 Yes No *Under HMRC Regulations you cannot make a partial transfer of current year subscriptions*
4. **Please specify how much of your Cash ISA you want to transfer:**
 If you only wish to transfer your current year subscription please tick here
OR
 Please specify the amount to be transferred £

Transfer Authority (to be completed by the ISA investor)

I authorise my existing ISA Manager (as specified above) to transfer my above numbered ISA to the Loughborough Building Society. I authorise my existing ISA Manager to provide Loughborough Building Society with any information, written or non-written, concerning the cash ISA and to accept any instructions from them relating to the cash ISA being transferred.

Where notice is required for closure/part transfer of the existing cash ISA, I give my consent to either: [ISA investor to tick as appropriate]

- Serve full notice period before this instruction can be processed
OR
 Proceed immediately with the transfer accepting any penalty which may be applied

Signed Date

Transfer Acceptance (to be completed by new ISA Manager)

In circumstances where the funds transferred are not cash deposits, please notify me as I may not be able to accept the transfer. Otherwise Loughborough Building Society is willing to accept this investor's cash ISA funds, subject to HMRC ISA Regulations. The date shown below is deemed to be the transfer date of this cash ISA.

Date Name