

We will need to take some personal information in order to process this request.

Recipient account number:

## 1. Information about you

Title: \_\_\_\_\_ First name(s): \_\_\_\_\_ Surname: \_\_\_\_\_

Date of birth: (dd/mm/yyyy)       National Insurance number: (If you have one)

Permanent home address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Email address: \_\_\_\_\_ Mobile number: \_\_\_\_\_

## 2. Information about the ISA you want to transfer

Name of existing ISA provider: \_\_\_\_\_

Account number:                     Sort code:   -   -

Roll number (if applicable): \_\_\_\_\_

Current provider statement address (if available): \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## 3. Please complete section 3 or 4 (as relevant)

<p><b>Section 3</b> – If you have <b>not</b> subscribed to <b>this</b> ISA in this tax year: Please indicate how much of your Cash ISA you wish to transfer</p> <p>Whole Balance, (Closure) <i>tick here</i> <input type="checkbox"/></p> <p>(If less) Specific amount £ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/></p>	<p><b>Section 4</b> – If you <b>have</b> subscribed to <b>this</b> ISA in this tax year: Please indicate how much of your Cash ISA you wish to transfer</p> <p>Total subscriptions made in the current tax year: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/></p> <p><b>The amount in your account representing current tax year subscriptions can only be transferred in whole and not in part</b></p> <p>Please indicate how much of your Cash ISA you want to transfer</p> <p><b>Either</b> transfer the whole Cash ISA (Closure), <i>tick here</i> <input type="checkbox"/></p> <p><b>Or</b> (if lesser amount please specify) £ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/></p> <p>Including current years subscriptions as stated above <i>tick here</i> <input type="checkbox"/></p> <p>Excluding current years subscriptions <i>tick here</i> <input type="checkbox"/></p> <p><b>Or</b>, if you <b>only</b> want to transfer your subscriptions from the current tax year, <i>tick here</i> <input type="checkbox"/></p> <p><b>Or</b>, if you <b>only</b> want to transfer your subscriptions from previous tax years, <i>tick here</i> <input type="checkbox"/></p>
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## 5. Transfer Authority

I authorise my existing ISA provider to transfer the ISA (account number above) to Nottingham Building Society. I authorise my existing ISA provider to provide Nottingham Building Society with any information about the Cash ISA and to accept any instructions from them relating to the Cash ISA being transferred.

Where I must give notice to close or transfer part of the existing Cash ISA, or the existing Cash ISA contains a fixed term deposit that has not reached its maturity date, I instruct my existing ISA provider to either (tick the appropriate box):

1. wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with the transfer;

OR

2. depending on the terms and conditions, carry out the transfer as soon as possible - I will accept any consequential loss of interest or charges that may be applied

Signed: \_\_\_\_\_ Date:       (dd/mm/yyyy)