

# Transfer Authority to move your existing ISA into your Skipton Lifetime ISA

(please use this form to transfer the following types of ISA - Cash/Innovative Finance/Help to Buy/Cash Lifetime)

## Section 1: Existing ISA provider's name and address

Name of existing provider

Address of existing provider

  


Postcode

## Section 2: Your personal details and details of your existing Cash ISA

Title (Mr/Mrs/Miss/Ms/Mx)

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 account number/roll 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.**

**All the questions below refer to the ISA you're transferring to Skipton. Please note, reference made to 'subscription' or 'subscribed' relates to payments.**

- Are you transferring from a Cash ISA or an Innovative Finance ISA? Yes  No   
This will be treated as a Lifetime ISA subscription. You can only transfer up to the £4,000 annual Lifetime ISA subscription limit.
- Are you transferring from a Help to Buy ISA? Yes  No   
This will be treated as a Lifetime ISA subscription. You can only transfer up to the £4,000 annual Lifetime ISA subscription limit.
- Are you transferring from a Lifetime ISA? Yes  No
- Do you wish to close your current ISA and transfer the full amount? Yes  No
- Have you subscribed to this ISA in this current tax year?  
(this refers to the ISA you're transferring into Skipton) Yes  No   
If **Yes**, please enter the amount paid in this tax year: £

Continued overleaf

## Section 2: Details of the Cash ISA (Continued)

6. If you answered **No** to **Question 4** please enter the total amount you want to transfer: £

Do you want to transfer current tax year subscriptions in Q5 above as part of this transfer? Yes  No   
(this means money paid into the ISA in this current tax year 6th April - 5th April)

**Please note that the amount in your account representing current tax year subscriptions can only be transferred in whole and not part and will be subject to the £4,000 Lifetime ISA annual subscription limit.**

7. 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 ISA to Skipton Building Society as detailed below:**

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

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

Existing Lifetime ISA account numbers


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

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

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

Customer Signature

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Date of signature (DD/MM/YY)

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>
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### Transfer acceptance

We are willing to accept this ISA transfer in line with the customer's 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 5 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 to the address below in order for us to arrange the transfer of funds:  
Customer Delivery, Skipton Building Society, Skipton, North Yorkshire, BD23 1DN**

Call in **branch** | Talk to us today **0345 850 1722** | Visit **skipton.co.uk**



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