

# 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, 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 number  Existing Sort Code

Roll Number (if applicable)  
 /

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

## Section 3: Customer Authorisation

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 any notice period has expired or following maturity before the transfer takes place. Yes  No

If your current Cash ISA has a fixed maturity date, please confirm the date your funds will be available to transfer:   /   /

Please note, if you are transferring into a new fixed ISA and your funds are not available until after the closing date for payments in to your new ISA (See product Terms & Conditions), we will be unable to action your transfer against this product.

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

In all cases, you will need to complete the appropriate Transfer or 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 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)

  /   /  

### 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, we will use the date we receive this form, fully completed as the transfer date.

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



Call 0345 850 1700



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Visit us in branch

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