

Cash ISA Transfer Authority Form

Information about you

Title	First Name(s):		Surname:
Date of Birth		National Insurance number:	
Permanent Residential Address			
Postcode			
Contact phone number			

Information about the ISA you want to transfer

Name of existing ISA provider _____

Account Number: _____

Sort Code _____

Please note

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 provider if you are not sure about this.

1. Do you want to transfer all or part of this ISA (please confirm estimated total value below)	All	Part	
Estimated ISA transfer value (please complete) £			
2. Have you subscribed to your current cash ISA in the current tax year?	Yes	No	
3. If you answered yes to Q2 and are transferring part of your ISA, do you want to include the subscription from the current tax year?	Yes	No	N/A

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

4. If you are asking to transfer part of your ISA, please say how much of your cash ISA you want to transfer:

£

Or, if you **only** want to transfer your subscription from the current tax year, tick here

Transfer authority

I authorise my existing ISA provider to transfer the ISA [account number above] to Vernon Building Society. I authorise my existing ISA provider to provide Vernon 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 to reached its maturity date, I instruct my existing ISA provider to either: [tick the appropriate box]

- Wait for the full notice period to end or wait until the maturity date [whichever is relevant] before going ahead with this transfer
 OR
- Depending on the terms and conditions, carry out the transfer as soon as possible - I will accept any consequential loss of interest or charges which may be applied

Signed

Date:

Transfer acceptance (your new ISA provider fills this part in)

We are willing to accept this ISA transfer in line with the customer's instructions above, as long as the following conditions are met.

- The transfer proceeds are made up of cash deposits only.
- We must receive the transfer proceeds no later than **NOT APPLICABLE**
- Where the customer has shown above that they want to transfer subscriptions from the current tax year, these must be no more than **NOT APPLICABLE**

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

Signed on behalf of Vernon Building Society

Date: