

Cash ISA transfer authority form



For full terms and conditions and identification requirements please refer to the appropriate leaflets. Please complete in ink all sections of the form in BLOCK CAPITALS and TICK WHITE BOXES where provided. Complete this application form if you are transferring your Cash ISA to us from another Cash ISA provider. Complete all questions marked with an *

Personal details

Title* Mr/Mrs/Ms/Miss/Other

Forenames* (in full)

Surname*

Date of Birth*

National Insurance Number*

You should be able to find your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP, or pension order book.

Permanent UK Residential Address

Postcode*

Telephone Number (Home) Telephone Number (Work)

(Mobile)* Email*

Preferred contact method* Home Work Mobile Email

Details about the cash ISA to be transferred

Name of existing ISA provider

Address of existing ISA provider

Postcode*

Sort code

Account number

ISA Account number (if applicable)

Have you subscribed to your current Cash ISA in the current tax year? Yes No

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 instructions before the transfer can go ahead. Please check with you existing provider if you are not sure about this.

I would like to transfer:

1. The full value** of my Cash ISA for the current tax year; and/or £ Approximate value

2. The full value ** of my Cash ISA from previous tax years; £ Approximate value

or 3. Part of the value** of my Cash ISA from previous tax years £ Approximate value

Total value £

Do you wish to transfer into an existing Ecology Building Society ISA? Yes No Account number

If you are transferring to an existing Ecology Building Society ISA, please complete and sign the Declaration on the final page of this form.

Please note that for current tax year subscriptions and accrued interest we accept whole transfers only. We don't accept partial transfers of current year funds.

** 'Full value' means both initial deposits and interest accrued. 'Part of the value' means the amount stated in the accompanying box. Partial transfers of Cash ISAs from previous tax years are allowed, subject to the Terms & Conditions of the ISA at the original institution. Please check with your existing provider.

Transfer authority

I authorise my existing ISA provider (as specified overleaf) to transfer my Cash ISA to Ecology Building Society. I authorise my existing ISA provider to provide Ecology 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 fixed term deposit that has not reached its maturity date, I instruct my existing ISA provider to either:

1. wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this 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 changes that may be applied.

I agree to be bound by the terms and conditions of the account I am transferring to.

I authorise Ecology Building Society to:

- hold my cash subscription and any interest earned on the subscriptions
- make on my behalf any claims to relief from tax in respect of ISA investments.

Before signing this form, you should carefully read our Customer Privacy Notice, which explains the purpose of collecting this data; the retention period; lawful reasons of processing and who this data is shared with.

Signed

Date

Please return to **Ecology Building Society, Ellis House, 7 Belton Road, Silsden, Keighley, West Yorkshire, BD20 0EE** with the documents we need.