Stocks and Shares to Cash ISA Transfer Authority Form

be delayed if the details do not match)

• There may be outstanding fees to pay before the transfer goes ahead.

If you are not sure what conditions apply please check with your existing stocks and shares ISA provider before completing this form.

Please ensure all boxes are completed in full, using black ink and BLOCK CAPITALS and sign as required. Incomplete or incorrect forms will cause a delay and may have to be returned to you and could also result in your application being rejected.

Information about you (Please ensure that the details held by both providers are correct and up to date, as the transfer may

A separate application form must also be submitted if you are transferring funds from another provider.

Title: (Mr/Mrs/Miss/Ms/Other)		Permanent home address:	
First name(s):			
Surname:			
Date of birth: (dd-mm-yyyy)			
Telephone Number: (Daytime)			
Telephone Number: (Evening)			
Mobile:		Postcode:	
National Insurance No:		Occupation:	
Transfer to a West Brom ISA - Account Number:	Please leave blank if transferring to a new ISA	Estimated Annual Income:	
Information abou	t the Stocks and Shares ISA you want to tran	sfer	
Name:			
(of existing ISA provider)			
(of existing ISA provider) Address: (of existing ISA provider)			
(of existing ISA provider) Address:			
(of existing ISA provider) Address:			
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(of existing ISA provider) Address: (of existing ISA provider) Postcode: (of existing ISA provider) ISA Account Number/Reference: Please note As well as being subject	to the terms and conditions of the Cash ISA receiving the trans and shares ISA. For example:	er proceeds, the transfer v	will be undertaken subject to the terms and conditions
Postcode: (of existing ISA provider) Postcode: (of existing ISA provider) ISA Account Number/Reference: Please note As well as being subject applying to your stocks of Some stocks and shall		•	·

Continued overleaf



will be transferred to your new provider in its entirety. Please note, this will not include any residual income earned after the ISA has been transferred. 2) Have you subscribed to this stocks and shares ISA in the current tax year? (tick here! Yes No If you answered 'All' to question 1, please go directly to the Transfer authority section below. If you answered 'Part' to question 1, please answer questions 3 – 5 below. Partial Transfers 3) If you answered 'Yes' to question 2 do you want to transfer your current tax year ISA subscription (this would involve selling any investments made will from the current tax year) (tick here! Yes No 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 only want to transfer your subscriptions from the current tax year, (tick here! or If you only want to transfer of your subscriptions from previous tax years (as well as investments relating to current year subs if you answered yet (tick here! and provide sale instructions by answering question 5. 5) Stocks, Shares and/or Funds that you wish to sell. Please check your selection is permitted by your existing stocks and shares ISA provider prior to submitting the form. Please note that you may be a existing ISA provider to agree what to sell. Please use the box below to gree what to sell. Please use the box below to gree what to sell. Please use the box below to give instructions to your current stocks and shares ISA provider with regard to what specific value or Tax YearIsI should be and/or what investments should be realised to meet the transfer. If needed, please list all investments that you hold with the above ISA provider that you wish to sell and transfer the proceeds to your new Cash ISA with the West Brom. Alternatively, you may provide this information by supplying a separate list, e.g. by annotating a valuation statement from your provide this information by supplying a separate list, e.g. by annotating a valuation	Ple	ease answer the following questions						
If you answered XII to question 1 this will result in all investments current toxyeor? Rick here? Yes. No Prove you subscribed to this stocks and shares SA in the current tax year? Rick here? Yes. No Prove you subscribed to this stocks and shares SA in the current tax year? Rick here? Yes. No Prove you subscribed to this stocks and shares SA in the current tax year? Rick here? Yes. No Prove you subscribed to this stocks and shares SA in the current tax year? Rick here? Yes. No Provided Transfers	1)	Do you want to transfer all or part of your ISA? (tick her	re) All Part					
If you answered Mit to question I, please answer questions 3 – 5 below. Portial Transfers 3) If you answered Part 1 to question 2 do you want to transfer your current tax year SIA subscription this would involve selling any investments made will from the current tax year? Bick there! Yes 100 Please note that the amount in your account representing current tax year subscriptions can only be transferred in whole and not in part. If you only want to transfer your subscriptions from the current tax year, lick here! or if you only want to transfer your subscriptions from previous tax years, lick here! or If you only want to transfer subscriptions from previous tax years, lick here! or If you only years to transfer send of your subscriptions from previous tax years, lick here! or If you only years to transfer send of your subscriptions from previous tax years, lick here! ord provide sole instructions by answering question 5. 5) Stocks, Shares and/or Funds that you what to sell. Please set the your seldon is generalled by your existing stocks and shares ISA provider prior to submitting the form. Please note that you may be a certain SA provider to approve the too below to give instructions by consumer and shares ISA provider with regard to what specific value or Tax Yourist should be and/or what investments should be realised to meet the bransfer. If inseeded, please list all investments that you held with the above ISA provider that you wish to sell and transfer the proceeds to your new Cash ISA we the West Brann. Alternatively, you may provide this information by supplying a separate list e.g. by annotating a valuation advance of the vestment indicator e.g. ISIN, Seold, Culp etc. If inseeded, please list all investments that you held with the chose ISA provider that you wish to sell and transfer the proceeds to your new Cash ISA we the West Brann. Alternatively, you may provide this information by supplying a separate list e.g. by annotating a valuation advanced to the provider to sell the entire		If you answered 'All' to question 1 this will result in all investments currently held being sold. The sale proceeds, together with any uninvested cash currently held in the ISA						
If you answered Part to question 1, please answer questions 3 – 5 below.	2)	lave you subscribed to this stocks and shares ISA in the current tax year? (tick here) Yes No						
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3) If you answered "fest to question 2 do you want to transfer your current has year SA subscriptions this would involve selling any investments made will from the current tox year? Exh. exh. Please note that the amount in your account representing current tax year, tick here! or		If you answered 'Part' to question 1, please answer que	estions 3 – 5 below.					
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5b) Uninvested cash to be transferred				a valuation statement from your provider.				
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Please say how much of your uninvested cash balance in your stocks and shares ISA you want to transfer £ or, if you want to transfer all of your uninvested cash balance, (tick here)			Investment Indicator e.g. ISIN, Sedol, Cuip etc	a valuation statement from your provider. Number or Value of Stocks, Shares, Units or				

Transfer Authority	
authorise my existing ISA provider as specified above to sell investments and transfer the ISA in cash (account number above) to the West Brom.	
authorise my existing ISA provider to provide the West Brom with any information, written or non-written, concerning the stocks and shares ISA and to accept any instruction from them relating to the stocks and shares ISA being transferred.	1
Where I must give notice to close or transfer part of the existing stocks and shares ISA, or the existing stocks and shares ISA contains an investment which is designed and intended to be held for full term and has yet to reach redemption, I instruct my existing ISA provider to either: (tick the appropriate box)	
1. wait for the full notice period to end, or wait until redemption (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 accept any consequential loss of income, capital or charges that may be applied.	
Signature: Date:	٦
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Transfer acceptance (your new ISA provider fills this part in)	
We the West Bromwich Building Society 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 all the transfer proceeds no later than	Ц
Where the customer has shown above that they want to transfer subscriptions from the current tax year, these must not be more than	
Residual Income We do not accept residual income payments	
For the purposes of the transfer of the ISA wrapper under the ISA regulations, the date shown here will be the transfer date:	
Name of new provider:	

Please send your completed 'Letter of Authority to Transfer' form, together with your account application form to:

FREEPOST THE WEST BROM. (Please write the address exactly like this, all in upper case and on one line. You don't need to use a stamp. Please note: Royal Mail delivers Freepost as second class mail.)

Calls and electronic communications may be monitored and/or recorded for your security and may be used for training purposes. Your confidentiality will be maintained.

The West Brom is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority. Register no. 104877. 'the West Brom' is a trading name of West Bromwich Building Society.

