





## Transfer Authority

I authorise my existing ISA provider as specified above to sell investments and transfer the ISA in cash (account number above) to the West Brom.

I authorise my existing ISA provider to provide the West Brom with any information, written or non-written, concerning the Innovative Finance ISA and to accept any instruction from them relating to the Innovative Finance ISA being transferred.

Where I must give notice to close or transfer part of the existing Innovative Finance ISA, or the existing Innovative Finance 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:

## 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  /  /

- 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.)

Head Office: 2 Providence Place, West Bromwich B70 8AF. Visit our website: [www.westbrom.co.uk](http://www.westbrom.co.uk)

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.

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