## Stocks and Shares to Cash ISA Transfer Authority Form

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

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

be delayed if the a	detail	s do	not	ma	tch)																												
Title:														ermo																			
(Mr/Mrs/Miss/Ms/Other)													_ h	ome	add	lress	:		_														_
First name(s):																			_														
Surname:																			_														
Date of birth: (dd-mm-yyyy)																			_														
Telephone Number: (Daytime)																			_														_
Telephone Number: (Evening)													_						_														_
Mobile:													_						-														_
National Insurance No:																			-														_
Transfer to a West Brom ISA - Account Number:													Po	ostco	de:																		
	Please	: leave	blank if	transfe	erring	to a ne	w ISA																										_
Information abou	t the	Sto	cks (	and	Sho	ares	ISA	yo	u w	ant	to t	trar	nsf	er																			
Name: (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 applying to your stocks of							e Cas	h ISA	A rece	eiving	the	trans	sfer	proc	eed	ls, th	e tra	nsfei	r will	l be	und	ertak	ken s	ubje	ct to	the	term	ns an	d co	nditio	ons		
<ul> <li>Some stocks and sha which investments are</li> </ul>							part part	of a	n ISA	to be	e trar	nsfer	red,	or n	nay	plac	e coi	nditio	ons (	on h	ow s	such	a tro	ansfe	er is	und	ertak	cen, e	e.g. v	vhen	dec	idin	g
Your existing ISA prov	Your existing ISA provider may need you to give them specific information before the transfer can go ahead.																																
There may be outstar	nding f	ees to	pay b	efore	e the	transf	er go	es a	head	l.																							
If you are not sure what	condit	ions c	apply p	oleas	e che	eck wit	th you	ır ex	isting	stoc	ks ar	nd sh	nare	es ISA	\ pro	ovide	er be	fore	com	plet	ing t	his fo	orm.										

Continued overleaf



	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   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, lick here!   or If you only want to transfer your subscriptions from previous tax years, lick here!   or If you only want to transfer send of your subscriptions from previous tax years, lick here!   or If you only year to transfer send of your subscriptions from previous tax years, lick here!   or If you only year to transfer send of your subscriptions from previous tax years, lick here!   or all rounds sale instructions by answering question 5.  5) Stocks, Shares and/or Funds that you what to sell. Please can be found that you wast to sell. Please seek the your selection is permitted by your existing stocks and shares ISA provider prior to submitting the form. Please note that you may be a certain Share you sell on grant subscriptions from previous tax of shares ISA provider with regard to what specific value or Tax Yourist should be and/or what investments should be realised to meet the handler.  If ineeded, 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 with the West Brom. Alternatively, you may provide this information by supplying a separate list et al. by your autonation of your provide this information by supplying a separate list et a. by by unantitative and transfer the proceeds to your new Cash ISA with the West Brom. Alternatively, you may provide this information by supplying a separate list et a. by by unantitative the entire holding.												
If you answered Part to question 1, please answer questions 3 – 5 below.	2)	Have you subscribed to this stocks and shares ISA in the	he current tax year? (tick here) Yes No									
Persist Transfer  3. If you crossvered "Nest to question 2 do you went to transfer your current tax year SA subscription this would involve selling any investments made will from the current tax year? (link: here!		If you answered 'All' to question 1, please go directly to the <b>Transfer authority</b> section below.										
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.   Year of the third was a subscriptions from the current tax year, tick here!   or		If you answered 'Part' to question 1, please answer que	estions 3 – 5 below.									
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.   Year of the third was a subscriptions from the current tax year, tick here!   or	Par	tial Transfers										
If you only want to transfer your subscriptions from the current tax year, flick here!  If you only want to transfer all of your subscriptions from previous tax years, lick here!  If you only want to transfer some of your subscriptions from previous tax years (as well as investments relating to current year subs if you answered withink here!  If you only want to transfer some of your subscriptions from previous tax years (as well as investments relating to current year subs if you answered withink here!  Solos, shares and/or funds that you wish to sell  Please check your selection is permitted by your existing stacks and shares ISA provider prior to submitting the form. Please note that you may be a casting SA provider to agree 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 Yeartis! 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 Vest Brom. Alternatively, you may provide his information by supplying a separate list, ag, by annothing a voluction statement from your provide his information by supplying a separate list, ag, by annothing a voluction statement from your provide files information by supplying a separate list, ag, by annothing a voluction statement from your provide files have the vest and transfer the proceeds to your new Cash ISA with the Vest Brom. Alternatively, you may provide his information by supplying a separate list, ag, by annothing a voluction statement from your provide his information by supplying a separate list, ag, by annothing a voluction statement from your provide his information by supplying as expanded list, and transfer the proceeds to your new Cash ISA.  If you need the provide is a supply in the provide	3)	If you answered 'Yes' to question 2 do you want to trar from the current tax year!? (tick here) Yes No										
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or  If you only want to transfer some of your subscriptions from previous tax years (as well as investments relating to current year subs if you answered yethick here! on one provide sale instructions by answering question 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 casting ISA provider to agree 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 Yearls! 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.  Description of Investment  Investment Indicator e.g., ISIN, Sedal, Cuip etc.  (if known)  Number or Yakue of Stocks, Shares, specify 'All' to sell the entire holding.	4)											
itick here! and provides acel instructions by answering question 5.  5 Slocks, 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 or existing ISA provider to agree 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 Year(s) 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.  Description of Investment  Investment Indicator e.g. ISIN, Sedol, Culp at:  (if known)  Number or Value of Stocks, Shares, specify "All" to sell the entire holding.												
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(if known) specify 'All' to sell the entire holding		If needed, please list all investments that you hold with	the above ISA provider that you wish to sell and transfe	er the proceeds to your pew Cash ISA with								
5b) Uninvested cash to be transferred				a valuation statement from your provider.								
5b) Uninvested cash to be transferred			Investment Indicator e.g. ISIN, Sedol, Cuip etc									
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5b) Uninvested cash to be transferred			Investment Indicator e.g. ISIN, Sedol, Cuip etc	a valuation statement from your provider.  Number or Value of Stocks, Shares, Units or								
<b>5b)</b> Uninvested cash to be transferred			Investment Indicator e.g. ISIN, Sedol, Cuip etc	a valuation statement from your provider.  Number or Value of Stocks, Shares, Units or								
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	
I authorise my existing ISA provider as specified above to sell investments and transfer the ISA in cash (account number above	e) to the West Brom.
I authorise my existing ISA provider to provide the West Brom with any information, written or non-written, concerning the stock from them relating to the stocks and shares ISA being transferred.	ks and shares ISA and to accept any instruction
Where I must give notice to close or transfer part of the existing stocks and shares ISA, or the existing stocks and shares ISA cointended to be held for full term and has yet to reach redemption, I instruct my existing ISA provider to either: (tick the appropri	
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 – Laccept any consequential loss of incom-	e, capital or charges that may be applied.
Signature: Date:	
Transfer acceptance (your new ISA provider fills this part in)	
Transier acceptance (your new law provider this 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 $\frac{1}{2}$	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:	/ /

## 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.

the West Brom