

# Cash ISA Transfer Authority

## 1. About you

Title  First Name(s)  Surname

Date of Birth  NI Number

Permanent Residential Address

Postcode

Contact phone no

## 2. Information about the ISA being transferred

Name of existing ISA provider

Address of existing ISA provider

Type of ISA being transferred:  Cash (complete 2a)  Stocks and Shares (complete 2b)

### 2a. Cash ISA transfers:

Existing Sort Code   Existing Account Number               Roll Number (where applicable)

### 2 b. Stocks and Shares ISA transfers:

Existing Account Number / Plan Number

### 2.c Funds to be transferred (all to complete in full)

Transfer current year's allowance? (this must be transferred in full, partial transfers of current year's subscriptions cannot be accepted)

Yes  No

If yes, amount subscribed in current tax year

£

Transfer from previous years' allowance?

Yes  No

If yes, please advise whether this is in full or partial.

Full  Partial

If partial, please confirm the amount you would like to transfer

£

If in full, please advise the approximate balance to be transferred

£

Continued overleaf.

## Cash ISA Transfer Authority (cont.)

### 3. Transfer Authority

I authorise my existing ISA provider to transfer the ISA detailed in section 2 above to Vernon Building Society and provide them with any information they require about the ISA.

I authorise my existing ISA provider to transfer the ISA (tick one):

1. Immediately, in which case I accept any consequential loss of interest or penalty (if applicable).
2. After serving the required notice period, or at maturity on a fixed rate ISA.

**Signed**

**Dated**

### 4. Transfer Acceptance (To be completed by Vernon Building Society)

We are willing to accept this ISA transfer in line with the customer's instructions above, subject to the value being transferred in cash by bank transfer within 30 days of us sending this form.

For the purposes of the transfer of the ISA wrapper under the ISA regulations, the transfer date shall be the date we receive the funds, or the date stated on the Transfer History form, whichever is earlier.

The Transfer History form should be sent by email to: [isatransfers@thevernon.co.uk](mailto:isatransfers@thevernon.co.uk).

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