

CASH ISA SAVER ACCOUNT TRANSFER FORM – CUSTOMER AUTHORITY (ISATF)

CUSTOMER DETAILS	
Title	Surname
1 st Names	
Permanent Residential Address	
Postcode	
Date of Birth	
National Insurance Number	
Contact Tel No (inc area code)	

EXISTING ISA PROVIDER NAME & ADDRESS
Provider Name
Address
Postcode

INFORMATION ABOUT THE ISA TO BE TRANSFERRED

<div style="border: 1px solid black; display: inline-block; padding: 2px 10px;">ACCOUNT NUMBER</div>
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Please complete EITHER section 1 or 2

1 FULL TRANSFER

2 PART TRANSFER (please check with your ISA provider that this is possible)

Please close and transfer all of my ISA
Including accrued interest

Please transfer £ _____ from my ISA

The above amount includes subscriptions from this tax year

Note Subscriptions from this tax year must be transferred in full.

Also
Where a period of notice is required for closure/part transfer of the existing cash ISA, I give my consent to either
Serve the full notice period before this instruction can be processed

Or
Proceed immediately with the transfer and bearing any consequential penalty which may be applied.

TRANSFER AUTHORITY (TO BE COMPLETED BY THE ISA INVESTOR)

I authorise my existing ISA Manager (as specified above) to transfer the ISA (account number above) to Beverley Building Society. I authorise my existing ISA Manager to provide Beverley Building Society with any information, written or non-written, concerning the cash ISA and to accept any instructions from them relating to the cash ISA being transferred.
My evidence of investment/passbook is enclosed.

Customer Signature Date

TRANSFER ACCEPTANCE (TO BE COMPLETED BY NEW ISA MANAGER)

In circumstances where the funds to be transferred are not cash deposits, please notify me as I may not be able to accept the transfer. Otherwise I, Beverley Building Society, am willing to accept this investor's cash ISA funds, subject to HMRC rules (the ISA Regulations). I deem the date shown below to be the transfer date of this cash ISA.

Name Date

Please make cheque payable to Beverley Building Society Re (Customer Name) and forward to **Beverley Building Society, 57 Market Place, Beverley, HU17 8AA.**
Beverley Building Society ISA Account Number