

## Transfer application form (transfer to a stocks & shares ISA)

Full name

Permanent residential address

<input type="text"/>		
<input type="text"/>		
<input type="text"/>	<b>Postcode</b>	<input type="text"/>

Date of birth

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Do you have a National Insurance (NI) number?

Tick one box

Yes

No

If yes, you must enter it here

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Name of current cash ISA provider

Provider's address

<input type="text"/>		
<input type="text"/>		
<input type="text"/>	<b>Postcode</b>	<input type="text"/>

Account number

The subscriptions relate to (please tick relevant box)

Current tax year

Previous tax year

Both

Type of ISA to be transferred (please tick relevant box)

Cash

Stocks & shares

Cash and stocks & shares

I wish to transfer (please tick relevant box)

Full amount

Partial amount

£ <input type="text"/>
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Amount to be transferred  
(for partial transfers only)\*

**\*Please note that if current tax year subscriptions are being transferred, these current tax year subscriptions must be transferred in whole (including any related income).**

You should be able to find your NI number on a payslip, form P45 or P60, a letter from the H.M. Revenue & Customs, a letter from the DWP, or pension order book.

**I apply to transfer my existing ISA [and subscribe to this stocks & shares ISA for the tax year 20 / and each subsequent year until further notice].**

*Delete the words in brackets if you will not be subscribing to this ISA.*

**I declare that (if you will not be subscribing to this ISA, please delete the following declarations where indicated)**

- all subscriptions made, and to be made, belong to me *(delete if you will not be subscribing to this ISA)*
- I am 18 years of age or over
- I have not subscribed and will not subscribe more than £7,200 in total to a cash ISA and a stocks & shares ISA in the same tax year, and
- I have not subscribed and will not subscribe to another stocks & shares ISA in the same tax year that I subscribe to this stocks & shares ISA *(delete if you will not be subscribing to this ISA)*
- I am resident and ordinarily resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform CIS Unit Managers Limited if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

**I authorise CIS Unit Managers Limited**

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash *(delete if you will not be subscribing to this ISA)*
- or**
- to make on my behalf any claims to relief from tax in respect of ISA investments.

**I agree to the ISA terms and conditions**

**I declare that this application form has been completed to the best of my knowledge and belief.**

**Signed**

**Date**

## Notes

This application form can be used by customers wishing to transfer their existing ISA from their current ISA provider to a stocks & shares ISA provided by The Co-operative Investments. For further information on the stocks & shares ISA provided by The Co-operative Investments, please contact our Customer Contact Centre on 08457 46 46 46 or visit our website at [co-operativeinvestments.co.uk](http://co-operativeinvestments.co.uk)

**Please call 08457 46 46 46 if you would like to receive this information in an alternative format such as large print or Braille.**

**The Co-operative Investments is a brand name used by CIS Unit Managers Limited.**

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