

Full Name

Permanent Residential Address

Postcode

Date of Birth

Do you have a National Insurance (NI) Number? Yes No If Yes, you must enter it here
You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the Department for Work and Pensions (DWP), or pension order book.

Instructions:

I apply to transfer my existing ISA - Account Number

Product

Please forward your ISA passbook/certificate.

I give you notice to transfer on (date) With loss of interest Without loss of interest

- To transfer your ISA to another existing ISA complete Section A - Transfer Instructions
or
 To change the product on your existing ISA complete Section B - Product Change Instruction.

Section A - Transfer Instructions:

(a) To transfer the whole balance of your account tick here
or

(b) Enter the amount you would like to transfer £

Does this amount include subscriptions made in the current year? Yes No

Note:
It is important to note that under HM Revenue & Customs rules, only whole transfers of current tax year subscriptions can be carried out.

I want to transfer funds to an existing account number

and subscribe to this cash ISA for the tax year 2008/2009 and each subsequent year until further notice (delete if you will not be subscribing to this ISA after the transfer).

Please forward the existing passbook/certificate.

Section B - Product Change Instruction:

Please change my existing cash ISA to:

Product

I declare that:

- all subscriptions made, and to be made, belong to me;
- I am 16 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 and shares ISA in the same tax year;
- I have not subscribed and will not subscribe more than £3,600 of the overall £7,200 total to a cash ISA;
- I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash ISA; and
- 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 Yorkshire Building Society 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.

Delete these declarations if you will not be subscribing to this ISA after the transfer.

I authorise Yorkshire Building Society:

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
- 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.

For Internal Use Only	
Branch Code	<input type="text"/>
Staff Number	<input type="text"/>

Signature: Date: