

Thank you for requesting to transfer your cash ISA to Yorkshire Building Society. **PLEASE NOTE - WE ONLY ACCEPT CASH ISA FUNDS.** You must already have an ISA account with us to request the transfer.
Return this form to **ISA Transfer Team, Savings Service, Yorkshire Building Society, Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ.**

Existing ISA provider details:

Company

Address

Postcode

Head Office use:

URN:

Customer details:

Title: (Mr/Mrs/Ms/Miss/Other)

Name:

Yorkshire Building Society Account Number

Permanent residential address:

Postcode

Date of Birth

National Insurance Number

Information about the ISA to be transferred:

Account number

Please complete **EITHER** section 1 or 2

1 Full Transfer

Please close and transfer

ALL of my ISA

including any accrued interest

2 Part Transfer (please check with your ISA provider that this is possible)

Please transfer £ _____ from my ISA.

The above amount includes subscription from this tax year

NOTE: Subscriptions from current tax year must be transferred in full.

Also:

Where 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 accept any loss of interest which my current ISA provider may apply

I apply to subscribe to this ISA in tax year **2011/12** and subsequent tax years. (This does **not** obligate you to subscribe)

Declaration

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 the overall subscription limit in total to a cash ISA and a stocks and shares ISA in the same tax year
- I have not and will not subscribe more than the cash ISA subscription limit in one cash ISA
- I have not and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash 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 Yorkshire Building Society if I cease to be so resident and ordinarily resident or to perform such duties or to be married to, or in a civil partnership with a person who performs such duties.

Transfer authority (to be completed by the account holder)

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

I agree to the ISA terms and conditions.

Customer signature _____ Date _____

Yorkshire Building Society is willing to accept the transfer of cash ISA funds only and asks you to send the transfer history and your cheque (we only accept transfers by cheque), **quoting the above Yorkshire Building Society account number**, to ISA Transfer Team, Savings Service, Yorkshire Building Society, Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ.

Office use only:

Branch Cashier - Checked information is correct Staff No. _____ Branch Code _____ Signed _____