

Please complete this form if you wish to transfer (merge) existing Yorkshire Building Society or Chelsea Building Society cash ISA to a Yorkshire Building Society ISA.

Your Details

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 DWP, or pension order book.

Your Instructions:

I authorise Yorkshire Building Society / Chelsea Building Society to transfer my existing cash ISA from account number to my existing Yorkshire Building Society cash ISA number in accordance with my instructions below (please tick box A or B below)

- A** Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer or
- B** depending on the terms and conditions, carry out the transfer as soon as possible - I will accept any consequential loss of interest or charges that may be applied.

Please complete **EITHER** section 1 or 2 below

Section 1. Full Transfer Please close and transfer ALL of my ISA as instructed above <input type="checkbox"/>	Section 2. Part Transfer Please transfer £ <input type="text"/> Does this amount include subscriptions made in the current tax year? Yes <input type="checkbox"/> No <input type="checkbox"/> NOTE: Subscriptions from current tax year must be transferred in full.
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Where you are requesting funds to be transferred into a Help to Buy: ISA the amount being transferred must be within the Help to Buy: ISA limits.

Please forward your ISA passbook/certificate together with these instructions.

I apply to subscribe for a cash ISA for the tax year 2017/2018 and each subsequent year until further notice. (This does not obligate you to subscribe).

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/made payments, and will not subscribe/make payments more than the overall subscription/payment limit in total to a cash ISA, a stocks and shares ISA, an innovative finance ISA, and a Lifetime ISA in the same tax year;
- 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 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 or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

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 terms and conditions of the account (including the ISA terms and conditions) which have already been provided. I will also be subject to the Rules of the Society (a copy of which can be obtained on request).

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

Signature: Date: