

Head Office Use: URN	
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Thank you for requesting to transfer your cash ISA to Yorkshire Building Society. Please return this form to:  
**ISA Transfer Team, Savings, Yorkshire Building Society, Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ.**

**My details:**

Title: (Mr/Mrs/Ms/Miss/Other) <input style="width: 150px;" type="text"/> Name: <input style="width: 150px;" type="text"/> Permanent residential address: <input style="width: 150px;" type="text"/> <input style="width: 150px;" type="text"/> <input style="width: 150px;" type="text"/> <div style="text-align: right; margin-right: 20px;">Postcode</div>	Yorkshire Building Society cash ISA account number: <input style="width: 150px;" type="text"/>  Date of birth: <input style="width: 150px;" type="text"/>  National Insurance Number: <input style="width: 150px;" type="text"/>
Daytime Telephone Number: <input style="width: 150px;" type="text"/>	
Evening Telephone Number: <input style="width: 150px;" type="text"/>	

**Information about the cash ISA to be transferred:**
**Existing ISA provider details:**

Company: <input style="width: 150px;" type="text"/>  Address: <input style="width: 150px;" type="text"/> <input style="width: 150px;" type="text"/> <input style="width: 150px;" type="text"/> <div style="text-align: right; margin-right: 20px;">Postcode</div>	Sort code: <input style="width: 150px;" type="text"/> - <input style="width: 50px;" type="text"/> - <input style="width: 50px;" type="text"/> Account number: <input style="width: 150px;" type="text"/> Reference/Roll Number (if applicable): <input style="width: 150px;" type="text"/>
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**Information about the amount I want to transfer:**
**Section 1 - Subscriptions**

Have you made subscriptions to the ISA you wish to transfer during the current tax year? Yes  No

If yes, please indicate how much £

Please complete **either** section 2 or 3 below

**Section 2 - Full Transfer**

Please close and transfer **ALL** of my cash ISA (including interest)

Or

**Section 3 - Partial Transfer** (please check with your existing ISA provider that this is possible)

Please tick and complete relevant box below

**Please note:** Subscriptions from the current tax year must be transferred in full (including interest)

<input type="checkbox"/>	Transfer	£	from my cash ISA, including current year subscriptions, as indicated above
<input type="checkbox"/>	Transfer	£	from my cash ISA, excluding current year subscriptions
<input type="checkbox"/>	Only transfer my subscriptions from the current tax year		
<input type="checkbox"/>	Only transfer my subscriptions from the previous tax year		

**Details about when the transfer will happen:**

Where notice is required to transfer my existing cash ISA (either fully, partially or closure) I give my consent to either:

Serve the full notice period or wait until maturity date (whichever is relevant) before going ahead with the transfer. My maturity date is  (enter maturity date if applicable)

Or

Proceed immediately with the transfer. I accept any loss of interest or charges which my current ISA provider may apply

**Please read and sign the declaration and transfer authority overleaf**

Our printed material is available in alternative formats e.g. large print, Braille or audio.

Please visit us in branch or call us on **0345 1200 100**.

**SMALL CHANGE BIG DIFFERENCE SCHEME;** Yorkshire Building Society Charitable Foundation's aim is to help alleviate poverty, improve health and save lives. The Small Change Big Difference® (SCBD) scheme allows our members to donate the annual pence of interest from their savings or mortgage accounts to the Charitable Foundation. The average donation is less than 50p per year and the maximum is just 99p. Every penny donated through the SCBD scheme goes directly to help local charities recommended by members and colleagues.  
To donate the pence from your interest to the Charitable Foundation, simply put an X in this box

(**Small Change Big Difference** is a registered trademark of Yorkshire Building Society. Yorkshire Building Society Charitable Foundation Registered Charity No: 1069082. Registered Office: Yorkshire Drive, Bradford BD5 8LJ.)

### Transfer authority

I authorise my existing ISA provider to transfer the ISA (account number above) to Yorkshire Building Society. I authorise my existing ISA provider to provide Yorkshire Building Society with any information about the cash ISA and to accept any instructions from them relating to the cash ISA being transferred.

Customer Signature

Date

### To be completed by Yorkshire Building Society

#### Transfer acceptance

Yorkshire Building Society is willing to accept the transfer of Cash ISA funds only. The date shown below will be the transfer date.

Date:

Name of New Provider: Yorkshire Building Society

### Society use only

#### Cashier - Checked information is correct

Staff No.

Signed

Yorkshire Building Society cash ISA account number:

Branch/Agency  
Code

Date