

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 a pension order book.

Your Instructions:

I authorise Yorkshire Building Society/Chelsea Building Society to transfer my existing cash ISA account number

to my existing Yorkshire Building Society cash ISA (please tick box A or B below)

in accordance with my instructions 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
Section 2. Part Transfer

Please transfer

 £

 Does this amount include subscriptions made in the current tax year? Yes No
 NOTE: Subscriptions from current tax year must be transferred in full.

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 **2019/2020** 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 (trading as Chelsea 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:

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**.

Yorkshire Building Society is a member of the Building Societies Association and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Yorkshire Building Society is entered in the Financial Services Register and its registration number is 106085. Head Office: Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ. All communications with us may be monitored/recorded to improve the quality of our service and for your protection and security. Calls to 03 numbers are charged at the same standard network rate as 01 or 02 landline numbers, even when calling from a mobile.