

If you already have a Selftrade ISA and want to transfer an existing ISA from another manager, you need only to complete this form.
If you do not have a Selftrade ISA, please complete this form together with the Shares ISA application form for the current tax year.

Please return your transfer form in the envelope provided (no stamp is needed), alternatively post it to:
Selftrade, Account Management, Boatman's House, 2 Selsdon Way, London E14 9LA.

On completion and submission of this form you will be subject to our Terms and Conditions.

Section A Existing ISA manager and your details

you **must** complete all fields marked *
please use **CAPITALS**

Existing ISA manager

Company name*	<input type="text"/>
Address*	<input type="text"/> <input type="text"/> <input type="text"/>
Postcode*	<input type="text"/>
Phone number*	<input type="text"/>
Account number*	<input type="text"/>
Contact person(s)	<input type="text"/>
Email address	<input type="text"/>

Your details

Selftrade account number if applicable

Title*	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other title <input type="text"/>
Surname*	<input type="text"/>				
Forenames*	<input type="text"/>				
Permanent residential address*	<input type="text"/> <input type="text"/> <input type="text"/>				
Postcode*	<input type="text"/>				
Daytime phone*	<input type="text"/>				
Evening phone	<input type="text"/>				
Mobile phone	<input type="text"/>				

Section B

About the securities and cash you want to transfer

Description of transfer (as described below)

Transfer Securities only

Transfer Securities **and** cash

Transfer Cash only

Liquidate some/all securities **and** transfer

Type of ISA to be transferred*

Please tick one only

Stocks & Shares ISA

Cash ISA

Securities

Details of Securities to be transferred

Quantity

Details of Securities to be transferred	Quantity

Details of Securities to be liquidated

Quantity

Details of Securities to be liquidated	Quantity

Cash

Approximate amount of residual cash to transfer (and sale proceeds, if applicable)

£

Please indicate any special instructions you would like us to pass on to your existing ISA manager

Section C

Declaration

Investor declaration to existing ISA manager:

I wish to transfer my existing ISA detailed above to a Selftrade Shares ISA with immediate effect. I hereby declare that you may:

- provide Selftrade with any information they may require pertaining to the ISA I wish to transfer.
- act upon instructions from Selftrade.
- any cash balance in my account should be remitted by cheque to Selftrade (payable to 'Selftrade client account').
- deduct any charges for the transfer of this ISA as detailed in your Terms and Conditions.

Signature*

Date*

DD / MM / YYYY