

To transfer a Cash ISA to Selftrade, you must have an existing Selftrade Cash ISA. You can open a Cash ISA online at www.selftrade.co.uk.

To initiate a transfer, please complete this form and post it to:
Selftrade, Account Management, Boatman’s House, 2 Selsdon Way, London E14 9LA.

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"/>	Sort code if applicable	<input type="text"/>
Contact person(s)	<input type="text"/>	Roll number if applicable	<input type="text"/>
Email address	<input type="text"/>		

Your details

Selftrade account number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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"/>						
Forename(s)*	<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 Transfer details

Description of transfer

Transfer my complete balance and close my ISA

Make a partial transfer

Partial transfers only

Amount to transfer £

If you have subscribed to your existing ISA in the current tax year, do you wish to include the subscription for this current year? Yes No N/A

Please note that under HMRC regulations, only whole transfers of current year subscriptions and interest can be accepted.

Section C Transfer Authority

I authorise my existing ISA provider to transfer the ISA (account number overleaf) to Selftrade.

I authorise my existing ISA provider to provide Selftrade with any information, written or non-written, with regards to the Cash ISA and to accept any instructions from them relating to the Cash ISA being transferred.

Where a notice period is required for closure/ part transfer of the existing Cash ISA or the existing Cash ISA holds a fixed term deposit that has not yet reached its maturity date, I give my consent to (please tick as appropriate):

Serve the full notice period or wait until the scheduled maturity date (as appropriate before this instruction can be processed)

OR

Proceed immediately with the transfer. I accept any penalty which may be incurred.

Signature*

Date*

Transfer acceptance - Selftrade use only

In circumstances where the funds to be transferred are not cash deposits, please notify us as we will not be able to accept the transfer.

Otherwise, we Selftrade are willing to accept this investor's Cash ISA funds, subject to HMRC rules (the ISA regulations).

We deem the date shown below to be the transfer date of this Cash ISA.