

Please complete this form in black ink and use block capitals. Once completed, please return to the Society (address overleaf) together with your Cash ISA application form and identification (if applicable).

Information about you

Title Forename(s) Surname

Permanent Residential Address (including postcode)

Date of Birth National Insurance Number*

Daytime telephone number

Information about the Cash ISA to be transferred

Name of existing ISA Provider:

Sort Code:

Account number:

Roll number (if applicable):

Please note: The terms and conditions of some ISA products do not allow only part of an ISA to be transferred. Your existing provider may need you to give them specific information before the transfer can go ahead. Please check with your existing ISA provider if you are not sure about this.

Please answer either Question 1 or Question 2:

1. If you have **not** subscribed to this Cash ISA in the current tax year, please indicate here how much of your Cash ISA you want to transfer.

Either if you want to transfer the whole Cash ISA, tick here

Or, if less, indicate the amount you wish to transfer here £.....

2. If you have subscribed to this Cash ISA in the current tax year, please indicate the total subscriptions made in current tax year £.....

The amount in your account representing current tax year subscriptions can only be transferred in whole and not in part.

Please indicate below how much of your Cash ISA you want to transfer.

Either if you want to transfer the whole Cash ISA, tick here

Or £..... including current year subscriptions as stated above, tick here

Or excluding current year subscriptions, tick here

Or, if you **only** want to transfer your subscriptions from the current tax year, tick here

Or, if you **only** want to transfer your subscriptions from previous tax years, tick here

Transfer Authority

I authorise my existing ISA provider (as specified overleaf) to transfer the ISA (account number overleaf) to Market Harborough Building Society. I authorise my existing ISA provider to provide Market Harborough Building Society with any information about the Cash ISA and to accept any instructions from them relating to the Cash ISA being transferred.

Where I must give notice to close or transfer part of the existing Cash ISA, or the existing Cash ISA contains a fixed-term deposit that has not reached its maturity date, I instruct my existing ISA provider to either:
(please tick appropriate box)

1 Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer;

Or

2 Depending on the terms and conditions, carry out the transfer as soon as possible – I will accept any consequential loss of interest or charges which may be applied.

Signed Date

**You will 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.*

IF YOU REQUIRE THIS INFORMATION IN LARGE PRINT, BRAILLE OR ON AUDIO FORMAT, PLEASE LET US KNOW.

Welland House, The Square, Market Harborough, Leicestershire, LE16 7PD
Tel: 01858 412250 Fax: 01858 412254
Email: CustomersFirst@mhbs.co.uk Website: www.mhbs.co.uk

Transfer acceptance (to be completed by new ISA provider)

We are willing to accept this ISA transfer in line with the customer’s instructions above, as long as the following conditions are met.

- The transfer proceeds are made up of cash deposits only.
- We must receive the transfer proceeds no later than
- Where the customer has shown above that they want to transfer subscriptions from the current tax year, these must not be more than £.....

For the purposes of the transfer of the ISA wrapper under the ISA regulations, the date shown below will be the transfer date.

Date:

Market Harborough Building Society

Please forward your transfer form and cheque made payable to the customer to:

Market Harborough Building Society
The Savings Team
Welland House
The Square
Market Harborough
Leicestershire
LE16 7PD