

CASH ISA TRANSFER AUTHORITY FORM

Information about the Investor (To be completed by the ISA Investor)

Title		First Name		Surname	
Date of Birth		National Insurance Number			
Permanent Residential Address					
Postcode		Contact Number			

Information about the ISA to be transferred (To be completed by the ISA Investor)

Name of Existing ISA Manager		
Address of Existing ISA Manager		
Account Number and Sort Code of Existing ISA to be transferred		
Estimated Account to be transferred	£	

1. Do you want to close your current Cash/Stocks & Shares ISA and Transfer all the balance, including the accrued interest YES / NO
(If requesting a partial transfer, please check with your existing ISA Manager that this is possible. Please check your individual product terms and conditions to see if product transfers are allowed on your ISA)
2. Have you subscribed to your current Cash/Stock & Shares ISA in the current Tax Year YES / NO
If you answered YES to Q1, please ignore Q3 & Q4
3. If you answered YES to Q2: Do you want to transfer current tax year subscriptions as part of this transfer? YES / NO
It is important to note that under HM Revenue & Customs ISA Regulations, only whole transfers of current tax year subscriptions and interest can be accepted.
4. Please specify how much of your Cash/Stocks & Shares ISA you want to transfer:
If only current year subscription plus interest is to be transferred, tick here
OR specify the amount

Transfer authority (to be completed by the ISA Investor)

I authorise my existing ISA Manager (as specified above) to transfer the ISA (account number above) to **The Mansfield Building Society**.

I authorise my existing ISA Manager to provide **The Mansfield Building Society** with any information, written or non-written, concerning the Cash/Stocks & Shares ISA and to accept any instructions from them relating to the Cash/Stocks & Shares ISA being transferred.

Where a period of notice is required for closure/part transfer of an existing cash ISA or the existing Cash ISA contains a fixed-term deposit that has not reached its maturity date, I give my full consent to either

1. Serve the full notice period or wait until the maturity date before this instruction can be processed
OR
2. Proceed immediately with the transfer and bearing any consequential penalty/loss of interest which may be applied

Signed.....Date.....

Transfer Acceptance (to be completed by the NEW ISA Manager)

The Mansfield Building Society is willing to accept this investors Cash/Stocks & Shares ISA funds, subject to HMRC rules. I deem the date shown below to be the transfer date of this Cash/Stocks & Shares ISA.

Please note **The Mansfield Building Society** only provides Cash ISA's at this time

Date		Telephone	
Name	Address		

The Mansfield Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Reference number 206049.
Member of the Building Societies Association.