

If you do not hold a Selftrade Shares ISA account but wish to transfer an existing ISA from another ISA manager, please complete this form together with the Selftrade Shares ISA application form. If you already have a Selftrade Shares ISA, and only wish to transfer an existing ISA from another ISA manager into your Shares ISA, you only need to complete this form.

Please complete all fields in this form (where applicable).

Section A Your personal details	
Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>
Last Name	<input type="text"/>
First Name(s)	<input type="text"/>
Date of Birth	<input type="text" value="DDMMYYYY"/>
Existing account number (if applicable)	<input type="text"/>
National Insurance number	<input type="text"/>
Address details	<input type="text"/>
Daytime telephone number (please include extension number if appropriate)	<input type="text"/>

Section B Notification to existing ISA manager of intention to transfer an ISA	
Please complete a separate ISA transfer form for each ISA Manager	
Name of Existing ISA Manager	<input type="text"/>
Address of existing ISA Manager	<input type="text"/>
Telephone number	<input type="text"/>
ISA holder's name	<input type="text"/>
Account number	<input type="text"/>

## Section C Details of securities and cash to be transferred

Please complete a separate ISA transfer form for each ISA Manager

Type and description of transfer (Please mark with a cross)

1. Current year's Subscription

Please transfer my ISA as securities only  Cash only  Cash and securities (List securities below)

And/or

2. Previous years' subscription Partial  Full

Please transfer my ISA as securities only  Cash only  Cash and securities (List securities below)   
(if partial transfer please list securities below) (if partial enter amount)

£

Description of securities to transfer:

(e.g. Lloyds Banking Group Ord. 10p) and/or provide us with a recent statement

Quantity



Special instructions

Please indicate any special instructions to be passed on to your existing ISA Manager:

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## Section D Declaration

Investor Declaration to existing ISA Manager

I wish to transfer my existing ISA detailed above to my 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
- you may act upon instructions from Selftrade; and
- you may deduct any charges for the transfer of this ISA as detailed in your Terms and Conditions

Signed

Date

D	D	M	M	Y	Y	Y	Y
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Please return the transfer form together with your application form (if required) to:

**Selftrade PO Box 4923 Worthing BN99 6SF**