Stocks and Shares to Cash ISA Transfer Form



Information about the customer		
Name: Title First name(s)		
Surname		
Ford Money Application or Account Number		
Permanent Residential Address		
Postcode		
Date of Birth / / (DD/MM/YY) National Insurance Number		
Information about the Stocks and Shares ISA to be transferred		
Name of existing ISA provider		
Address of existing ISA provider		
Destands		
Postcode		
ISA Account Number/Reference		
Please note: As well as being subject to the Terms and Conditions of the Cash ISA receiving the transfer will be undertaken subject to the Terms and Conditions applying to your Stocks and Share	•	
 Some Stocks and Shares ISA products do not allow only part of an ISA to be transferred, or monhow such a transfer is undertaken, e.g. when deciding which investments are sold to facility 	nay place	conditions
• Your existing ISA provider may need you to give them specific information before the transfer	r can go a	head.
There may be outstanding fees to pay before the transfer goes ahead.		
If you are not sure what conditions apply please check with your existing Stocks and Shares I completing this form.	ISA provid	der before
Q1. Do you want to transfer all or part of your ISA?	All	Part
If you answered 'All' to question 1 this will result in all investments currently held being sold. The sale proceeds, together with any uninvested cash currently held in the ISA, will be transferred to your new provider in its entirety. Q2. Have you subscribed to this Stocks and Shares ISA in the current tax year?	Yes	No 🗔
If you answered 'All' to question 1, please go directly to the Transfer Authority section below. If you answered 'Part' to question 1, please answer questions 3 – 5 below.		
Partial Transfers		
Q3. If you answered yes to Q2 do you want to transfer your current tax year ISA subscription		
(this would involve selling any investments made with the subscription from the current tax year)?	Yes	No
Please note that the amount in your account representing current tax year subscriptions can only be transferred in whole and not in part.		
Q4. If you only want to transfer your subscriptions from the current tax year, tick here:		
OR		
If you only want to transfer all of your subscriptions from previous tax years, tick here:		
OR If you only want to transfer some of your subscriptions from previous tax years (as well as investments relating to current year subscriptions if you answered yes to Q3) tick here and provide sale instructions by answering Q5.		

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Q5a. Stocks, Shares and / or Funds that you wish to sell.

Please check your selection is permitted by your existing Stocks and Shares ISA provider prior to submitting the form. Note that you may be contacted by your existing ISA provider to agree what to sell.

If needed please list all investm	ents that you hold with the above ISA pro	ovider that you wish to sell and transfer
-	SA with Ford Money. Alternatively, you ma	-
a separate list, e.g. by annotatin	g a valuation statement from your provid	er.
Description of Investment	Investment Indicator e.g. ISIN, Sedol, Cuip etc. (if known)	Number of Value of Stocks, Shares, Units or specify 'All' to sell the entire holding
] [
		1
]
] [
Q5b. Uninvested cash to be tran		
Please say how much of you your Stocks and Shares ISA	ur uninvested cash balance in	£
your olders and onales for	, you want to transfer	~ [

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Transfer Authority (To be completed by the customer)

I authorise my existing ISA provider as specified above to sell investments and transfer the ISA in cash (account number overleaf) to Ford Money.

I authorise my existing ISA provider to provide Ford Money with any information, written or non-written, concerning the Stocks and Shares ISA and to accept any instruction from them relating to the Stocks and Shares ISA being transferred. Where I must give notice to close or transfer part of the existing Stocks and Shares ISA, or the existing Stocks and Shares ISA contains an investment which is designed and intended to be held for full term and has yet to reach redemption, I instruct my existing ISA provider to either:

(tick the appropriate box)

(tick the appropriate box)	
 Wait for the full notice period to end, or wait until redemption (whichever is relevant) before going ahead with this transfer 	
OR	
 Depending on the Terms and Conditions, carry out the transfer as soon as possible – I accept any consequential loss ofincome, capital or charges that may be applied. 	
Name	
Signed	
Date DD / MM / YY	

Please note that a failure to complete this form fully may result in a delay in the transfer. Please return your completed ISA Transfer Form to the following freepost address:

RTUB-AAXH-UHKE

Ford Money

PO Box 871

Wallsend

NE28 5BT

If you need any help or assistance please call us on 0345 266 1231 or email us at help@fordmoney.co.uk

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