



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

 Postcode
 ISA Account Number/Reference

Please note: As well as being subject to the Terms and Conditions of the Cash ISA receiving the transfer proceeds, the transfer will be undertaken subject to the Terms and Conditions applying to your Stocks and Shares ISA. For example:

- Some Stocks and Shares ISA products do not allow only part of an ISA to be transferred, or may place conditions on how such a transfer is undertaken, e.g. when deciding which investments are sold to facilitate the transfer.
- Your existing ISA provider may need you to give them specific information before the transfer can go ahead.
- 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 ISA provider before completing this form.

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.



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)

1. Wait for the full notice period to end, or wait until redemption (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 accept any consequential loss of income, capital or charges that may be applied.

Name

Signed

Date

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