

# TRANSFER FORM

## TRANSFER AUTHORITY FOR YOUR EXISTING CASH ISA PROVIDER



Manchester Building Society is a trading name of Newcastle Building Society. Newcastle Building Society is the ISA Manager for all Manchester Building Society Cash ISA's.

### 1. INFORMATION ABOUT YOU

Title:	Forename(s):	Surname:
Date of birth: <b>DD / MM / YYYY</b>	Preferred contact telephone number:	
Permanent residential address:		
		Postcode:
Do you have a National Insurance (NI) Number?: YES <input type="checkbox"/> NO <input type="checkbox"/>		
If Yes, you must enter it in the box to the right.		
You should be able to 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.		

### 2. INFORMATION ABOUT THE ISA YOU WANT TO TRANSFER

Name of existing ISA provider:		
Sort code:	Account number:	Roll number (if applicable):
<p><b>Please note:</b> 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 instruction before the transfer can go ahead. Please check with your existing provider if you are not sure about this.</p> <p>Please answer either Question 1 or Question 2:</p>		
1. If you have <b>not</b> subscribed to this Cash ISA in the current tax year, please tick <b>one</b> of the following options to indicate how much of your Cash ISA you want to transfer.		
Transfer the whole Cash ISA <input type="checkbox"/>		
Transfer part of the Cash ISA <input type="checkbox"/>	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 subscribed here		£
<p><b>Please note your current tax year subscriptions can only be transferred in whole and not in part.</b></p> <p>Please tick <b>one</b> of the following options to indicate how much of your Cash ISA you want to transfer.</p>		
Transfer the whole Cash ISA <input type="checkbox"/>		
Transfer part of the Cash ISA <b>including</b> your current year subscriptions <input type="checkbox"/>	Indicate the amount you wish to transfer here	£
Transfer part of the Cash ISA <b>excluding</b> your current year subscriptions <input type="checkbox"/>	Indicate the amount you wish to transfer here	£
Transfer your subscriptions for the current tax year only <input type="checkbox"/>		
Transfer your subscriptions from previous tax years only <input type="checkbox"/>		

### 3. TRANSFER AUTHORITY

I authorise my existing ISA provider to transfer the ISA (account number above) to Manchester Building Society. I authorise my existing ISA provider to provide Manchester 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 (tick the 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 that may be applied

Signature:	Date:
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### 4. TRANSFER ACCEPTANCE (YOUR NEW ISA PROVIDER FILLS THIS PART IN)

In circumstances where the funds to be transferred are not cash deposits, please notify me as I may not be able to accept the transfer. Otherwise I the Manchester Building Society am willing to accept this investor's cash ISA funds, subject to HMRC rules (the ISA Regulations). I deem the date shown below to be the transfer date of this cash ISA.

Date:	Name of new provider: <b>Manchester Building Society</b>
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Principal Office: 1 Cobalt Park Way, Wallsend, NE28 9EJ Chief Executive A.S. Haigh BSc  
 Manchester Building Society is a trading name of Newcastle Building Society.  
 Newcastle Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.  
 Newcastle Building Society is registered on the Financial Services Register under the firm reference number 156058.  
 We may monitor and record telephone calls for training and security purposes.