



BUCKINGHAMSHIRE BUILDING SOCIETY

Established in 1907 at Chalfont St. Giles

TRANSFER REQUEST TO EXISTING ISA PROVIDER

Name and address of your current ISA provider

Existing ISA
Account Manager

Full address including
postcode and ISA
account number

Postcode

ISA Account No.

Your Full Name

Your full address
including postcode

Postcode

Which Buckinghamshire Building Society would you like to transfer into?

Cash ISA

30 Day Cash ISA

What would you like to transfer?

Current year's Subscriptions

All previous years' subscriptions

Part previous years' subscriptions State amount: £

Have you subscribed to your current cash ISA in the current tax year?

Yes No

Total amount to be transferred £

It is important to note that under HM Revenue & Customers ISA Regulations, only whole transfers of current tax year subscriptions and interest can be accepted.

TRANSFER AUTHORITY (to be completed by the ISA investor)

I authorise my existing ISA Manager (as specified overleaf) to transfer the ISA (account number overleaf) to the Buckinghamshire Building Society. I authorise my existing ISA Manager to provide the Buckinghamshire Building Society with any information, written or non-written, concerning the cash ISA and to accept any instructions from them relating to the cash ISA being transferred.

Where a period of notice is required for closure / part transfer of the existing cash ISA, I give my consent to either: (ISA investor tick as appropriate)

- 1. Serve the full notice period before this instruction can be processed;
- OR
- 2. Proceed immediately with the transfer and bearing any consequential penalty which may be applied.

Signed:

Date:

Transfer Acceptance (to be completed by new ISA Manager)

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 Buckinghamshire 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.

Please ensure that the cheque is made payable to the Buckinghamshire Building Society re: "Name of investor" and posted to the address detailed below.

Buckinghamshire Building Society
High Street
Chalfont St Giles
Buckinghamshire HP8 4QB

Telephone: 01494 879500

Email: info@bucksbuildingsociety.co.uk

Signed on behalf of the Buckinghamshire Building Society :

Date:

A member of the Building Societies Association
Authorised and Regulated by the Financial Services Authority. Registration number 206022