

For office use only

Prepared By:  Checked By:

Customer number

Book number

Account number -

# Buckinghamshire Building Society Cash ISA Internal Transfer Application Form



Full name   
Permanent residential address   
  
Postcode

Date of Birth  
Day  Month  Year

Do you have a National Insurance number?  
Tick one box Yes  No

If yes you must enter it here

You should be able to find your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP, or pension order book.

I apply to transfer my existing Buckinghamshire Building Society cash ISA  A/C no.

To a **Simple cash ISA issue 2 / Simple 30 day cash ISA issue 2** (delete as required) with Buckinghamshire Building Society

[and subscribe to this cash ISA in the tax year 2017 / 2018 and each subsequent year until further notice.]  
Delete the words in brackets if you will not be subscribing to this ISA.

**I declare that**  
All subscriptions made, and to be made, belong to me; (delete if you will not be subscribing to this ISA)  
I am 16 years of age or over;  
I have not subscribed and will not subscribe more than the overall subscription limit in total to a Cash ISA and a stocks and shares ISA, an innovative finance ISA and a Lifetime ISA in the same tax year;  
I have not subscribed and will not subscribe more than the Cash ISA subscription limit to one Cash ISA;  
I have not subscribed and will not subscribe to another Cash ISA in the same year that I subscribe to this cash ISA; (delete if you will not be subscribing to this ISA)  
I am resident in the United Kingdom for tax purposes, or if not so resident, either perform duties which, by virtue of section 28 of the Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Buckinghamshire Building Society if I cease to be so resident or to perform such duties or to be married to, or in a civil partnership with, a person who performs such duties. (delete if you will not be subscribing to this ISA)

**I authorise Buckinghamshire Building Society**  
• to hold my cash subscriptions and any interest earned on those subscriptions;  
**and**  
• to make on my behalf any claims to relief from tax in respect of ISA investments.

**I agree to the ISA terms and conditions.**  
**I declare that this application form has been completed to the best of my knowledge and belief.**  
**I acknowledge that I have received and read the FSCS information sheet and exclusion list.**   
Tick box to confirm

Signed ..... Date .....