

**CASH ISA TRANSFER AUTHORITY FORM**

**Information about you**

Title  First name(s)  Surname

Home address

Postcode

Date of Birth 

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 National Insurance Number (if you have one) 

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Phone number  Email

**Information about the ISA you want to transfer**

Name and address of existing ISA provider

Postcode:

Account number 

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 Sort code 

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Roll number (if applicable) 

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**Please note:** 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 information before the transfer can go ahead. Please check with your existing ISA provider if you are not sure about this.

**Please answer either Question 1 or Question 2:**

1. If you have **not** subscribed to this Cash ISA in the current tax year, please indicate here how much of your Cash ISA you want to transfer.

**Either**, if you want to transfer the whole cash ISA, tick here  **or**, if less, 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 subscriptions made in the current tax year £

**The amount in your account representing current tax year subscriptions can only be transferred in whole and not in part.**

Please indicate here how much of your Cash ISA you want to transfer

**Either** if you want to transfer the whole Cash ISA, tick here

**or** £  Including current year subscriptions as stated above, tick here  **or** excluding current year subscriptions, tick here

**or**, if you only want to transfer your subscriptions from the **current tax year**, tick here

**or**, if you only want to transfer your subscriptions from **previous tax years**, tick here  Amount £

If you are transferring into an existing Buckinghamshire Building Society Cash ISA, please enter the account number

**TRANSFER AUTHORITY (to be completed by the ISA investor)**

I authorise my existing ISA provider to transfer the ISA (account number overleaf) to Buckinghamshire Building Society. I authorise my existing ISA provider to provide Buckinghamshire 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: (ISA investor tick as appropriate)

1. Wait for the full notice period to end or wait until the maturity date before going ahead with this transfer;   
The notice period on this account is.....days.  
The maturity date on this account is \_\_\_/\_\_\_/\_\_\_\_\_.

OR

2. Depending on the terms and conditions, carry out the transfer and I will accept any consequential loss of interest or charges which may be applied.

Signed by customer: .....

Date: .....

**Transfer Acceptance (to be completed by new ISA Manager)**

We are willing to accept this ISA transfer in line with the customer's instructions above, as long as the following conditions are met.

- The transfer proceeds are made up of cash deposits only.
- We must receive the transfer proceeds no later than \_\_\_/\_\_\_/\_\_\_\_\_.
- Where the customer has shown above that they want to transfer subscriptions from the current tax year, these must not be more than £20,000.

For the purposes of the transfer of the ISA wrapper under the ISA regulations, the date shown below will be the transfer date.

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@bucksbs.co.uk](mailto:info@bucksbs.co.uk)

Signed on behalf of Buckinghamshire Building Society :

Signature: .....

Date: .....

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

Tel: 01494 879500

Fax: 01494 876256

[www.bucksbs.co.uk](http://www.bucksbs.co.uk)

E-mail: [info@bucksbs.co.uk](mailto:info@bucksbs.co.uk)

A member of the Building Societies Association

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Registration number 206022