

Account Number .....

### Information about the investor (to be completed by the ISA investor)

Title	Permanent residential address (including postcode)
First name(s)	
Surname	
Date of birth:	
National Insurance number (if you have one)	
Contact Tel. no. (inc. area code)	

### Information about the ISA to be transferred (to be completed by the ISA investor)

Name of existing ISA Manager	Address of existing ISA Manager (including postcode)
Account number of existing ISA to be transferred:	

<b>1. Do you want to close your current cash ISA and transfer all the balance, including the accrued interest?</b> If requesting a partial transfer, please check with your existing ISA Provider that this is possible.	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>

<b>2. Have you subscribed to your current cash ISA in the current tax year?</b>	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>

If you have answered YES to Q1, please ignore Q3 and Q4.

<b>3. If you answered YES to Q2: Do you want to transfer current tax year subscriptions as part of this transfer?</b> It is important to note that under <i>HM Revenue and Customs ISA Regulations</i> , only whole transfer of current tax year subscriptions and interest can be accepted.	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>

<b>4. Please specify how much of your cash ISA you want to transfer;</b> If <b>only</b> current year plus subscription plus interest is to be transferred, tick here <input type="checkbox"/>
OR specify £ _____ OR _____

### Transfer Authority (to be completed by the ISA investor)

I authorise my existing ISA Manager (as specified above) to transfer the ISA (account number above) to Principality Building Society.  
I authorise my existing ISA Manager to provide Principality 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 to 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 Principality Building Society)

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 (Principality 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
<b>Principality Building Society, Principality Buildings, P.O. Box 89, Queen St., Cardiff, CF10 1UA. 0845 045 0452</b>