

# Forms

## Application to transfer internally from one Principality Building Society Cash ISA to another

<b>Full name</b>	
<b>Permanent residential address</b>	
<b>Post Code</b>	
<b>Date of birth</b>	
<b>National Insurance [NI] Number</b>	
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 cash ISA	A/c No	
to cash ISA	A/c No	

[and subscribe to this cash ISA for the tax year 2011/2012

### 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 £10,680
- \* I have not subscribed and will not subscribe more than £5,340 of the overall £10,680 total to a Cash ISA
- \* I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash ISA ; [delete if you will not be subscribing to this ISA] and
- \* I am resident & ordinarily resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax [Earnings & 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 Principality if I cease to be so resident & ordinarily resident or to perform such duties or 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 Principality

- \* where the Principality is not an insurer-manager to hold my cash subscription, ISA investments, interest, dividends & any other rights or proceeds in respect of those investments and any other cash
- or**
- \* where the Principality is an insurer-manager to hold my cash subscriptions, any other proceeds in respect of my ISA investments & any other cash;
  - \* to make on my behalf any claims to relief from tax in respect of ISA investments

### I agree to the ISA terms & conditions

I declare that this application form has been completed to the best of my knowledge and belief

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

Principality Building Society, P.O. Box 89, Principality Buildings, Queen Street, Cardiff, CF10 1UA. [www.principality.co.uk](http://www.principality.co.uk)