

Principality Cash ISA transfer form

Information about you

Principality account number		Title	
National Insurance number		First name(s)	
Date of birth		Surname	
Permanent home address			
Postcode		Contact phone number	

Information about the ISA you want to transfer

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 provider if you are not sure about this.

Name of existing ISA provider	
Account number	
Sort code	
Roll number (if applicable)	
Do you want to transfer all or part of this cash ISA?	All <input type="checkbox"/> Part <input type="checkbox"/>
If all, please give the estimated balance	£
Have you subscribed to the ISA you are transferring in the current tax year?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If you answered yes to the above question and are transferring part of your ISA, do you want to include the subscription from the current tax year?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Please note that the amount in your account representing current tax year subscriptions can only be transferred in whole and not in part.

If you are asking to transfer part of your ISA, please say how much of your cash ISA you want to transfer?	£
If you have subscribed to your cash ISA in the current tax year and wish to transfer that amount, please confirm the total subscriptions made in the current tax year	£
If you are only transferring your subscription from the current tax year, tick here	I only want to transfer my subscription from the current tax year <input type="checkbox"/>

Transfer authority

I authorise my existing ISA provider to transfer the ISA [account number on previous page] to Principality Building Society.
I authorise my existing ISA provider to provide Principality Building Society with any information about the cash ISA and to accept any instructions from them relating to the cash ISA being transferred.

☐ Wait for the full notice period to end or wait until the maturity date - - before going ahead with this transfer

OR

☐ Depending on the terms and conditions, carry out the transfer as soon as possible - I will accept any consequential loss of interest or charges which may be applied

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:

Signed

Date

Transfer acceptance

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 that they want to transfer subscriptions from the current tax year, these must be no more than:

£

For the purposes of the transfer of the ISA wrapper under the ISA regulations, the date shown opposite will be the transfer date:

- -

IMPORTANT: It can take up to 15 business days to process your transfer from the date we receive your form. For Stocks and Shares ISA transfers it can take 30 business days. If your transfer is not completed within 15 business days, please **contact us**.

What next?

Please check this form has been completed in full and signed then take it to your nearest branch or send it to: FAO: Savings Team, Principality Building Society, Principality Buildings, PO Box 89, Queen Street, Cardiff, CF10 1UA



CALL US
0330 333 4000*



ONLINE
principality.co.uk



BRANCH
Pop in to see us



Where home matters
principality.co.uk

*To help us maintain our service and security standards, telephone calls may be monitored and recorded.

Principality Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, reference number 155998. Principality Building Society, Principality House, The Friary, Cardiff, CF10 3FA. principality.co.uk

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