

**ISA Transfer-In**

**Application Form**

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| Please complete **sections 1, 2 and 3** if you wish to transfer your existing ISA to Unity Mutual.  Once completed please return the form to our freepost address below:  **FREEPOST UNITY MUTUAL** (Must be UPPERCASE, no further address details are required)  We will work with your current ISA provider to complete the transfer as quickly as possible. |

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| 1. **Your details** | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Surname** |  | | | | | | **Title** | | | | | | | |  | | | | | | | | | | |
| **Forename(s)** |  | | | | | | **Date of Birth** | | | | | | | | **d** | | **d** | | **m** | **m** | | **y** | | | **y** |
| **Address** |  | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Postcode** |  | | | **NI Number** | | |  |  |  |  | |  | |  | |  | |  | | |  | |  |  | |
| *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 Department of Work & Pensions, or pension order book.* | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Tel No. (Home)** | |  | | | | | | | | | | | | | | | | | | | | | | | |
| **Tel No. (Mobile)** | |  | | | | | | | | | | | | | | | | | | | | | | | |
| **Email** |  | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. **Information about your Current ISA** | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Name of provider** | | |  | | | | | | | | | | | | | | | | | | | | | | |
| **Address of provider** | | |  | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | **Postcode** | | | | |  | | | | | | | | | | | | | | |
| **Current ISA Account Number/Reference** | | | | |  | | | | | | | | | | | | | | | | | | | | |
| **Type of ISA to be transferred (**tick as appropriate**)** | | | | | | | Cash ISA Stocks & Shares ISA | | | | | | | | | | | | | | | | | | |
| **Have you subscribed to your existing ISA in the current tax year?** | | | | | | | | | | | | | Yes No | | | | | | | | | | | | |
| **If Yes, how much?** | | | | | | | | | | | | | **£** | | | | | | | | | | | | |
| **Do you wish to transfer the whole balance? \*** | | | | | | | | | | | | | Yes No | | | | | | | | | | | | |
| **If No, how much?** | | | | | | | | | | | | | **£** | | | | | | | | | | | | |
| *\* Note, if you are transferring from a Stocks & Shares ISA you must transfer the whole balance for the current tax year.* | | | | | | | | | | | | | | | | | | | | | | | | | |

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| 1. **Transfer Instruction** | | | | | | |
| I authorise my existing ISA provider as specified overleaf to sell investments and transfer the ISA in cash (account number above) to Unity Mutual. I authorise my existing ISA provider to provide Unity Mutual with any information concerning my ISA and to accept any instruction from them relating to the ISA being transferred.  Where I must give notice to close or transfer part of the existing Stocks & Shares ISA, or the existing Stocks & Shares ISA contains an investment which is designed and intended to be held for full term and has yet to reach redemption, I instruct my existing ISA provider to either (tick the appropriate box):   1. no notice required for transfer of closure.   Where I must give notice to close or transfer part of the existing ISA in accordance with the terms and conditions applying to that account, or the existing ISA contains a fixed-term deposit that has not reached its maturity date, I instruct my existing ISA provider to either:   1. wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer;   or;   1. carry out the transfer as soon as possible – I will accept any loss of interest or exit charges that may be applied in accordance with the terms and conditions applying to that account. | | | | | | |
| **Signature** …………………………………………………………………………………………… **Date** ……………………………… | | | | | | |
| 1. **Transfer Acceptance (to be completed by Unity Mutual)** | | | | | | |
| We are willing to accept this ISA transfer in line with the customer's instructions above, as long as the value is transferred as cash. | | | | | | |
| We deem the date shown to be the transfer date of this ISA: | **d** | **d** | **m** | **m** | **y** | **y** |
| **Signature on behalf of Unity Mutual** ……………………………………………………………………………………… | | | | | | |