

**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**
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| **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**
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| **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**
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| 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.
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| **Signature** …………………………………………………………………………………………… **Date** ……………………………… |
| 1. **Transfer Acceptance (to be completed by Unity Mutual)**
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| 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** ……………………………………………………………………………………… |