



aldermore

Aldermore
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w aldermore.co.uk/savings

Cash ISA transfer

To transfer money held in a cash ISA with another provider, please complete this form using black ink and BLOCK CAPITALS and return it to us at the address above.

If you are transferring money from multiple Cash ISAs, please complete one form for each provider.

Please call us on 0845 604 2678 if you need any assistance completing the form.

**Existing Aldermore Cash ISA
or Application Reference Number**

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Personal details

Title

Forename(s)

Surname

Date of birth

Postcode

Details of transfer

I wish to transfer my existing Cash ISA from (name of current provider):

Sort code Account number

To my existing/new Aldermore Cash ISA

Date of transfer

If the Cash ISA you are transferring from has a notice period, please ensure the date of transfer provides sufficient time, otherwise your provider may charge you an early withdrawal penalty.

Please indicate which of the following applies to your transfer:

- This transfer only consists of previous years' ISA subscriptions.
- This transfer includes only ISA investments from the current tax year.
- This transfer includes ISA investment from the current tax year and from previous year ISA subscriptions.

Full transfer (please put a cross in the box to select this option)

Please close and transfer all of my ISA

Part transfer: please transfer the following amount from my ISA

£

Note: subscriptions from this tax year must be transferred in full.

I authorise Aldermore:

(i) To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash.

(ii) To make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA Terms and Conditions that I read and accepted when opening my account

I authorise my current provider to transfer the money to my Aldermore Cash ISA. Please make cheques payable to my name & Account Number

Signature

Date

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Aldermore Bank PLC is authorised and regulated by the Financial Services Authority.

Registered Office: 1st Floor, Block B, Western House, Lynch Wood, Peterborough, PE2 6FZ. Registered in England No. 947662.

Aldermore Savings' documentation is available in Braille, large print and audio versions.

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