

Cash ISA transfer form

- To transfer a Cash ISA from another provider to Aldermore, you must open an Aldermore Cash ISA. You can transfer into an Aldermore Notice Cash ISA, an Aldermore Reward Cash ISA and/or an Aldermore Easy Access Cash ISA at any time and into an Aldermore Fixed Rate Cash ISA at account opening only. If you haven't yet opened an Aldermore Cash ISA, please visit our website www.aldermore.co.uk.
- This form can be used for the transfer of an existing Cash ISA to Aldermore. If you wish to transfer an existing Stocks and Shares ISA, please visit our website or contact us to obtain the relevant form.
- If you're transferring money from multiple Cash ISAs, please complete one form for each separate ISA account you wish to transfer.

How to return this form

By email: This form is editable which means if you've PDF editing software such as Adobe Acrobat Reader, you can complete this form electronically. Simply complete this form online, sign it electronically, save a copy for your records and then email to us at service@aldermoresavings.co.uk. If you don't have this software, you can print off this form and complete it manually using BLOCK CAPITALS and either take a photo or scan the form and send it as an attachment.

By post: Please complete using black ink and BLOCK CAPITALS and send back to us at the address at the bottom of this form (no stamp needed).

Please also take a moment to review our **privacy policy** (www.aldermore.co.uk/legal/privacy-policy) before signing the form. By completing and signing this form, you confirm that you've read and accept it.

Section 1 - Customer Details

Customer Details Guide: To help identify you quickly; Enter your details ensuring each section is completed using **black ink**. Use upper-case for alphabetical characters. Examples are provided below.

Aldermore Account No or Application Reference No: A	A - Ensure your Account/Application Reference is entered in the format displayed. e.g. 1234567 if using your 7 digit Aldermore Account No or 123456789 if using your Application Reference No
First Name: B	B - Provide your first name as it appears on your account, e.g. JOHN
Surname: C	C - Provide your surname as it appears on your account, e.g. SMITH
Date of Birth (DOB): D	D - Ensure your Date of Birth is entered in the following format - DD/MM/YYYY, e.g. 01/02/1980
National Insurance Number: E	E - Enter your National Insurance number in the following format - AB-123456-C
Permanent Residential Address: Postcode: F	F - Enter your permanent residential address as it appears on your account, e.g. FLAT/HOUSE NO/NAME STREET NAME TOWN/CITY POSTCODE

Section 2 - ISA Transfer Details

ISA Transfer Details Guide: To minimise delays to your transfer, enter your details ensuring relevant sections are completed using **black ink**. Examples are provided below.

Existing Provider Name: G	G - Enter the name of your existing ISA provider e.g. HALIFAX								
Sort Code: (If you do not have a sort code skip to J) H <table border="1" data-bbox="156 387 620 454"> <tr> <td></td><td></td><td>-</td><td></td><td></td><td>-</td><td></td><td></td> </tr> </table>			-			-			H - Enter your ISA's sort code in the following format - 12-34-56
		-			-				
Account Number: (If this exceeds 8 digits skip to J) I <table border="1" data-bbox="156 510 620 577"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>									I - Enter your ISA's 8 digit account number e.g. 12345678
Roll/Reference No (If applicable): J	J - Enter the roll or reference number of your ISA. If you are unsure of this you may wish to confirm this with your existing provider.								
Do you wish to transfer all or part of this ISA? K <div> All <input type="checkbox"/> </div> <div> Part <input type="checkbox"/> </div> <p>If you have selected 'All' skip to section 3. Otherwise continue below:</p>	K - Clearly indicate by ticking one of the boxes provided whether you want to close your ISA and transfer all funds including unpaid interest (All) or whether you wish to transfer a partial amount (Part).								
Confirm from the options below which subscriptions you would like to transfer: L <div> Current year subscriptions only - <input type="checkbox"/> </div> <div> Previous year subscriptions only - <input type="checkbox"/> </div> <div> Current year subscriptions & part of previous year subscriptions - <input type="checkbox"/> </div>	L - If you have specified above that you wish to transfer part of your ISA clearly indicate by ticking one of the boxes provided to confirm if these funds are from the current/previous tax year or a combination of both. Important note - Current year subscriptions can only be transferred in full								
How much of your ISA would you like to transfer? M	M - Clearly state the amount you wish to transfer using the following format - £19,999.99								

Section 3 - Authorisation

Important note: HMRC timescales for a **Cash ISA transfer is 15 business days**, should your ISA transfer exceed this timescale then interest will be backdated from the 16th business day **so long as the information provided above is correct.**

I authorise my existing ISA provider to transfer my Cash ISA to Aldermore and share relevant information with them. I also authorise my existing ISA provider to follow Aldermore's instructions regarding the transfer. If notice is required to close or transfer the ISA, or it contains a fixed-term deposit that hasn't matured, I instruct my provider to:

- | | |
|---|-----------------------------|
| 1. Wait for the full notice period to end or wait until maturity (whichever is applicable) before going ahead with the transfer OR | 1. <input type="checkbox"/> |
| 2. Depending on the terms and conditions of my account, carry out the transfer as soon as possible. I accept any consequential loss of interest or charges that may be applied. | 2. <input type="checkbox"/> |

Ensure all information provided above is accurate, if satisfied sign and date, our postal address can be found below:

Signature:	Aldermore Freepost RSAZ-AXXH-LHAX PO Box 762 WALLSEND NE28 5DH
Date:	t 0345 604 2678 e service@aldermoresavings.co.uk w aldermore.co.uk

Aldermore

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