

# Cash ISA Transfer Form for Help to Buy: ISA

If you don't already hold an Aldermore Help to Buy: ISA, please complete our 'Help to Buy: ISA Account Opening Form' in the first instance.

Please note that you can transfer a Cash ISA held with another provider into an Aldermore Help to Buy: ISA at any time, however payments are subject to the maximum opening and monthly allowances.

This form should only be used to request 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.

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 shown to the right. If you are transferring money from multiple Cash ISAs, please complete one form for each separate ISA account you wish to transfer.

Please call us on 0345 604 2678 if you need any assistance completing any of our forms.

Aldermore  
Freeport RSAZ-AXXH-LHAX  
PO Box 762  
WALLSEND  
NE28 5DH

t 0345 604 2678  
e service@aldermoresavings.co.uk  
w aldermore.co.uk/personal

Aldermore Help to Buy: ISA Enquiry Number/Account Number:

## Personal details

Title  First name

Middle name(s)

Surname

Date of birth  National Insurance number

Address

Postcode

Contact Phone No.

## 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 Help to Buy: ISA.

1. Is your existing ISA a Help to Buy: ISA? Yes  No

(a) If yes, please indicate the total subscriptions in the current tax year £  and go directly to the Transfer Authority section below

**Please note if you are not transferring from a Help to Buy: ISA any payments (including transfers) into your Help to Buy: ISA are subject to the maximum opening and monthly allowances (maximum £1,200 opening deposit for a new Help to Buy: ISA, or maximum £200 for an existing Help to Buy: ISA)**

2. Do you want to transfer all or part of your ISA? All  Part  If all go to Q7

3. Have you subscribed to your ISA in the current tax year? Yes  No  If no go to Q5

The amount in your account representing current tax year subscriptions can only be transferred in whole and not in part

4. Do you **only** want to transfer your subscriptions from the current tax year? Yes  No  If yes go to Q7

5. Do you **only** want to transfer all of your subscriptions from previous tax years? Yes  No  If yes go to Q7

6. Do you only want to transfer some of your subscriptions from previous tax years? Yes  No

(a) If yes, how much £  (subject to the maximum opening and monthly allowances)

(b) If yes, do you also want to transfer your subscriptions from the current tax year? Yes  No

7. Is your existing ISA a Cash ISA? Yes  No

If you wish to transfer an existing Stocks and Shares ISA, please visit our website or contact us to obtain the relevant form.

## Cash to Help to Buy: ISA Transfers

### 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 ISA provider if you are not sure about this.

### Portfolio ISAs

If you hold a portfolio ISA containing a Help to Buy: ISA, please provide all ISA account numbers and details below

Help to Buy: ISA Account Number / Reference	Value	Total Subscriptions in Current Tax Year
	£	£

Cash ISA Account Number / Reference(s)	Value	Total Subscriptions in Current Tax Year
	£	£
	£	£
	£	£

## Transfer Authority

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 authorise my current provider to transfer the money to my Aldermore Help to Buy: ISA. Please make cheques payable to my name & Aldermore Help to Buy: ISA Enquiry Number/Account Number.

Please tick as appropriate:

No notice is required for closure/part transfer of the existing Cash ISA

Where a period of notice is required for closure/part transfer of the existing Cash ISA, or the existing Cash ISA holds a fixed term deposit that has not yet reached its maturity date, I give my consent to either:

- (i) Serve the full notice period or wait until the scheduled maturity date (as appropriate) before this instruction can be processed or
- (ii) Subject to terms and conditions, proceed as soon as possible with the transfer and I will bear any consequential loss of interest or any other charge which may be applied

Signature

Date

# Aldermore



Backed by  
HM Government

Aldermore Bank PLC is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. (Financial Services Register number:204503). Registered Office: 1st Floor, Block B, Western House, Lynch Wood, Peterborough, PE2 6FZ. Registered in England. Company No. 947662.

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

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