

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 at any time and into an Aldermore Fixed Rate Cash ISA at account opening stage only. If you haven't yet opened an Aldermore Cash ISA, please visit our website aldermore.co.uk/personal.

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.

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.

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 Cash ISA Enquiry Number/Account Number:

Personal details

Title First name
Middle name Surname
Date of birth National Insurance number
Address Postcode
Contact Phone No.

Information about the Cash ISA you want to transfer

Name and address of existing ISA provider
Sort code: ISA Account Number/Reference Number:

Q1. Have you subscribed to your ISA in the current tax year? Yes No

Under HMRC ISA Regulations, current year subscriptions must be transferred in full including interest.

Q2. Do you want to transfer all or part of your ISA? All Part

If transferring 'Part' you must complete Q3, however if you're transferring 'All' please ignore Q3.

Q3. How much of your ISA do you want to transfer?

Please tick one option only, and where requested provide the total amount to be transferred. We will have to return incomplete or incorrectly filled in forms which may delay the processing of your transfer.

- Current year subscriptions only (plus interest) Must be transferred in full
- Previous years subscriptions only Amount to be transferred £
- Current year subscriptions and part of previous year subscriptions Amount of previous years subscriptions to be transferred £

Transfer authority

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

I authorise my existing ISA provider (as specified above) to transfer the ISA (account number above) to Aldermore. I authorise my existing ISA provider to provide Aldermore with any information, written or non-written, concerning the Cash ISA and to accept any instructions from them relating to the Cash ISA being transferred. I authorise my existing ISA provider to transfer the money to my Aldermore Cash ISA. Please make cheques payable to my name and Aldermore Cash ISA Enquiry Number/Account Number.

Signature Date

Aldermore

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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