



## TRANSFER REQUEST TO EXISTING ISA PROVIDER

Name and address of your current ISA provider

Existing ISA  
Account Manager

Full address including  
postcode and ISA  
account number

Postcode	ISA Account No.

Your Full Name

Phone number:

Your full address  
including postcode

Postcode	

Which Buckinghamshire Building Society account would you like to transfer into?

3<sup>rd</sup> Issue Fixed Rate Cash ISA Bond

Monthly Income 3 Year Fixed Rate ISA Bond

Monthly Income 4 Year Fixed Rate ISA Bond

What would you like to transfer?

Current year's Subscriptions

State amount:

£

All previous years' subscriptions

State amount:

£

Part previous years' subscriptions

State amount:

£

Have you subscribed to your current cash ISA in the current tax year?

Yes

No

Total amount to be transferred

£

**If you are not sure of the exact total amount, please fill in the box above with the estimated amount.**

**It is important to note that under HM Revenue & Customs ISA Regulations, only whole transfers of current tax year subscriptions and interest can be accepted.**

**TRANSFER AUTHORITY (to be completed by the ISA investor)**

I authorise my existing ISA Manager (as specified overleaf) to transfer the ISA (account number overleaf) to the Buckinghamshire Building Society. I authorise my existing ISA Manager to provide the Buckinghamshire Building Society 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.

Where a period of notice is required for closure / part transfer of the existing cash ISA, I give my consent to either: (ISA investor tick as appropriate)

- 1. Serve the full notice period before this instruction can be processed;  
(please state date at end of notice period.....)

OR

- 2. Proceed immediately with the transfer and bearing any consequential penalty which may be applied.

Signed: .....

Date: .....

**Transfer Acceptance (to be completed by new ISA Manager)**

In circumstances where the funds to be transferred are not cash deposits, please notify us as we may not be able to accept the transfer. Otherwise we, the Buckinghamshire Building Society are willing to accept this investor's cash ISA funds, subject to HMRC rules (the ISA Regulations). We deem the date shown below to be the transfer date of this cash ISA.

Please ensure that the cheque is made payable to the Buckinghamshire Building Society re: "Name of investor" and posted to the address detailed below.

Buckinghamshire Building Society  
High Street  
Chalfont St Giles  
Buckinghamshire HP8 4QB

Telephone: 01494 879500

Email: [info@bucksbuildingsociety.co.uk](mailto:info@bucksbuildingsociety.co.uk)

Signed on behalf of the Buckinghamshire Building Society : .....

Date: .....