Cash ISA transfer authority form

Ecology Building Society

Please complete all sections of the form in BLOCK CAPITALS and TICK BOXES where provided. Complete this transfer form if you are transferring your Cash ISA to us from another Cash ISA provider. You must already have an opened Ecology ISA account. Complete all questions marked with an *.

Personal details

Title* Mr ☐ Miss ☐ Mrs ☐ Ms ☐ Dr ☐ Prof ☐ Rev ☐ Mx ☐

Forenames* (in full)

Surname*

Date of Birth*

National Insurance Number*

You should be able to find your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP, or pension order book.

Permanent UK Residential Address

Postcode*

Telephone Number

Mobile Number

Email*

Details about the cash ISA to be transferred

Name of existing ISA provider*

Address of existing ISA provider

Postcode

Sort code

Account number

OR if your ISA has no sort code and more than eight digits in the account number:

ISA Account number

Have you subscribed to your current Cash ISA in the current tax year? Yes ☐ No ☐

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 instructions before the transfer can go ahead. Please check with your existing provider if you are not sure about this.

I would like to transfer:

1. The full value** of my Cash ISA for the current tax year; and/or ☐ £ Approximate value

2. The full value ** of my Cash ISA from previous tax years; ☐ £ Approximate value

or **3.** Part of the value** of my Cash ISA from previous tax years ☐ £ Approximate value

Total value £

Please give the details of the Ecology ISA you would like to transfer your funds into. (You must have already opened an Ecology ISA account to transfer into.)

Ecology ISA account number

Please note that for current tax year subscriptions and accrued interest we accept whole transfers only. We don't accept partial transfers of current year funds.

** 'Full value' means both initial deposits and interest accrued. 'Part of the value' means the amount stated in the accompanying box. Partial transfers of Cash ISAs from previous tax years are allowed, subject to the Terms & Conditions of the ISA at the original institution. Please check with your existing provider.

Transfer authority

I authorise my existing ISA provider (as specified overleaf) to transfer my Cash ISA to Ecology Building Society. I authorise my existing ISA provider to provide Ecology Building Society with any information about the Cash ISA and to accept any instructions from them relating to the Cash ISA being transferred.

Where I must give notice to close or transfer part of the existing Cash ISA, or the existing Cash ISA contains fixed term deposit that has not reached its maturity date, I instruct my existing ISA provider to either:

1. wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer; ☐

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or

2. depending on the terms and conditions, carry out the transfer as soon as possible – I will accept any consequential loss of interest or changes that may be applied. ☐

I agree to be bound by the terms and conditions of the account I am transferring to.

I authorise Ecology Building Society to:

- hold my cash subscription and any interest earned on the subscriptions
- make on my behalf any claims to relief from tax in respect of ISA investments.

Before completing this form, you should carefully read our Customer Privacy Notice, which explains the purpose of collecting this data; the retention period; lawful reasons of processing and who this data is shared with.

I declare that the details on this form are correct and authorise the transfer of my ISA. Typed name accepted in lieu of handwritten signiture:

Date:

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Please return this completed form (including an Ecology Cash ISA application form if you don't have an account already) to: Ecology Building Society, Ellis House, 7 Belton Road, Silsden, West Yorkshire BD20 0EE
or email **savings@ecology.co.uk** with the documents we need.