

If you do not hold an Equiniti Shareview Dealing ISA but wish to transfer an existing ISA from another ISA manager, please complete this form together with the Equiniti ISA Application Form. If you already have an Equiniti Shareview Dealing ISA, and only wish to transfer an existing ISA from another ISA manager into your Equiniti ISA, you only need to complete this form. If you have any questions about completing this form, please call the Customer Experience Centre on **0345 300 0430**.

Please complete all the fields in this form (where applicable).

**Section A** Your personal details

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input style="width: 100%;" type="text"/>
Last Name(s)	<input style="width: 100%;" type="text"/>				
First Name(s)	<input style="width: 100%;" type="text"/>				
Date of Birth	<input style="width: 100%; text-align: center;" type="text" value="D D M M Y Y Y Y"/>			Contact Number	<input style="width: 100%;" type="text"/>
National Insurance Number	<input style="width: 100%;" type="text"/>				
Address Details	House No.	<input style="width: 100%;" type="text"/>			
Permanent Home Address	<input style="width: 100%; height: 40px;" type="text"/>				
	Postcode	<input style="width: 100%;" type="text"/>			
Shareview Dealing Account Number	<input style="width: 100%;" type="text"/>				

**Section B** Notification to existing ISA manager of intention to transfer an ISA

Please complete a separate ISA transfer form for each ISA Manager

Name of Existing ISA Manager	<input style="width: 100%;" type="text"/>
Address of existing ISA Manager	<input style="width: 100%; height: 40px;" type="text"/>
	Postcode <input style="width: 100%;" type="text"/>
Telephone number	<input style="width: 100%;" type="text"/>
ISA holder's name	<input style="width: 100%;" type="text"/>
Existing Account Number	<input style="width: 100%;" type="text"/>

## Section C Details of securities and cash to be transferred

Please complete a separate ISA transfer form for each ISA Manager

Type and description of transfer (Please mark with a cross)

### 1. Current year's Subscription

Please transfer my ISA as securities only

Cash only

Cash and securities  
(List securities below)

And/or

2. Previous years' subscription Partial

Full

Please transfer my ISA as securities only  
(if partial transfer please list securities below)

Cash only  
(if partial enter amount)

Cash and securities  
(List securities below)

£

Description of securities to transfer:  
(e.g. Lloyds Banking Group Ord. 10p) and/or provide us with a recent statement

Quantity



Special instructions

Please indicate any special instructions to be passed on to your existing ISA Manager:

--

## Section D Declaration

### Investor Declaration to existing ISA Manager

I wish to transfer my existing ISA detailed above to my Equiniti ISA with immediate effect.

I hereby declare that:

- you may provide Equiniti Financial Services Limited with any information they may require pertaining to the ISA I wish to transfer
- you may act upon instructions from Equiniti Financial Services Limited; and
- you may deduct any charges for the transfer of this ISA as detailed in your Terms and Conditions.

Signature

Date

--

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Please return the transfer form together with your application form (if required) in the pre-paid envelope provided to:

Equiniti,  
PO Box 4605,  
Aspect House,  
Spencer Road,  
Lancing,  
West Sussex,  
BN99 6QY