

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 Customer Services 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 type="text"/>
Last Name(s)	<input type="text"/>
First Name(s)	<input type="text"/>
Date of Birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> Contact Number <input type="text"/>
National Insurance Number	<input type="text"/>
Address Details	House No. <input type="text"/>
Permanent Home Address	<input type="text"/> Postcode <input type="text"/>
Shareview Dealing Account Number	<input 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 type="text"/>
Address of existing ISA Manager	<input type="text"/> Postcode <input type="text"/>
Telephone number	<input type="text"/>
ISA holder's name	<input type="text"/>
Existing Account Number	<input 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:

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## 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

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D	D	M	M	Y	Y	Y	Y
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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