

Cash ISA transfer request

From another ISA provider to Glasgow Credit Union

Transfer to Glasgow Credit Union Cash ISA number:

Member Number:

If you already have a Cash ISA account with Glasgow Credit Union, please complete this form and return it to us. Alternatively, if you've not yet opened a Cash ISA with us, you must complete an ISA application before completing this transfer request. You should check whether the ISA you are requesting to transfer has any restrictions. For example, you may only be able to transfer your whole balance or just the current tax year's subscriptions. Also, there may be a loss of interest or charge from your existing provider if you transfer your ISA funds. You may also need to provide notice before the transfer can go ahead.

Personal Details

Name

Permanent residential
address

Country of residence

Date of birth

National Insurance number

Contact Telephone number

Email address

Current ISA provider

Name of existing provider

ISA number
(Account Number)

Sort code

Roll/Reference number
(If applicable)

Your transfer instructions

Have you subscribed to your cash ISA with the provider named above in the current tax year?

Please note, any current tax year's subscriptions may only be transferred in full.

Yes

No

Do you want to transfer all or part of your ISA investment from the provider named above to your Glasgow Credit Union Cash ISA?

All

Part

If **all**, does this include previous years' subscriptions?

Yes

No

If **part**, do you wish to include (select one):

All current year's subscriptions

All current year's subscriptions plus part of previous year's subscriptions

Total amount

£

Previous year's subscriptions only

Total amount

£

I instruct my current ISA provider to (please tick one):

only go ahead with the transfer after the maturity date or at the end of the notice period for the ISA being transferred, whichever is applicable. I confirm the funds will be available within 30 days.

carry out the transfer as soon as possible and I will accept any loss of interest or charges which may be applied as a result of this, subject to the product terms and conditions.

Important note: If it will be more than 30 days before the funds are available to transfer, please contact us to discuss your options.

Your authority

I authorise Glasgow Credit Union to

- Hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; and
- Make on my behalf any claims to relief from tax in respect of ISA investments;
- I agree to the Cash ISA Terms and Conditions.

I authorise my current ISA provider to

transfer the ISA funds detailed overleaf to Glasgow Credit Union. I authorise my current ISA provider to provide Glasgow Credit Union with any information written or non-written concerning the cash ISA and to accept any instructions from Glasgow Credit Union relating to the ISA being transferred.

Signed:

Date:

Office use only

Date Transfer form received: / /

Processed by teller:

Glasgow Credit Union, 95 Morrison Street, Glasgow, G5 8BE