

Cash ISA Transfer Form

Information about you

Title _____

First Name(s) _____

Surname _____

Date of Birth _____

National Insurance number _____

Application or Account Number _____

Permanent Residential Address

Postcode _____

Information about the cash ISA to be transferred

Name of existing ISA provider _____

Account number _____

Sort Code _____

Roll number (as applicable) of existing ISA to be transferred _____

Please note

The terms and conditions of some cash ISA products do not allow only part of a cash ISA to be transferred. Your existing provider may need you to give them specific information before the transfer can go ahead. Please check with your existing cash ISA provider if you are not sure about this.



1. Do you want to transfer all or part of this Cash ISA All Part

If you have answered 'All' to question 1, please ignore questions 2, 3 and 4

2. Do you want to transfer your subscriptions from the current tax year?

Yes No

3. How much of your previous year's subscription do you want to transfer?

All Part None

4. Please specify how much of your cash ISA you want to transfer?

If only current year subscription plus expected profit to be transferred, tick here

Or specify amount

Important information regarding your Gatehouse Bank Cash ISA(s)

To help you take advantage of your full tax free allowance, Gatehouse Bank allows you to invest in a number of cash ISA products with Gatehouse Bank within the current tax year. The combined funds held for the current tax year must not exceed your annual allowance.

Transfer Authority (to be completed by the customer)

I authorise my existing cash ISA provider to provide Gatehouse Bank 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 I must give notice to close or transfer part of the existing cash ISA, or the existing cash ISA contains a fixed-term deposit that has not reached its maturity date, I instruct my existing cash ISA provider to either:

1. Serve the full notice period or wait until the maturity date (whichever is relevant) before going ahead with this transfer (please note Gatehouse Bank reserves the right to refuse any funds after the date the product is withdrawn),

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 charges which may be applied.



Important note: We will not commence with your transfer in until your account is opened and your Welcome Letter has been issued.

Signed:

Date:

Please note that a failure to complete this form may result in a delay in the transfer.

Please return your completed ISA Transfer Form to the following freepost address:

Gatehouse Bank

PO Box 861

Wallsend

NE28 5BP

