

ISA Internal transfer request form

For current and/or previous tax years' allowances

Complete this form to authorise the transfer of current and/or previous tax years' deposits in your Coventry Cash ISA, to another Coventry ISA, and return the form: FREEPOST CBS CUSTOMER SERVICES

Personal details

Title

First name(s)

Surname

Permanent residential address
(including postcode)

Date of birth

Do you have a National Insurance number? If yes, this must be entered below. Yes No

National Insurance number

Contact number

Email address

Coventry ISA you are transferring from

Account name

Coventry ISA number
(last 8 digits)

Is this account to be closed? Yes No

Is there a flexible allowance? Yes No

If there is a flexible allowance should this account be closed? Yes No

Coventry ISA that you are transferring funds to

Coventry ISA number
(last 8 digits)

Continued on the next page



Your transfer instructions

Do you want to transfer all or part of the money you have paid into your ISA in previous tax years?

All Part

Check that the ISA you're transferring to allows previous tax years' subscriptions.

If part, select one of the following:

All current year's subscriptions **only**

All current year's plus part of previous All And amount of previous £

Previous years' subscriptions only All or specific amount £

Any restrictions?

If the ISA you're transferring from has any withdrawal restrictions, for example a notice period or fixed term, do you want us to delay the transfer? Yes

or

Do you want us to carry out the transfer as soon as possible, which may mean that you incur a charge? Yes

Declaration and transfer authority

I declare that this form has been completed to the best of my knowledge and belief.

Signed

Date

For office use only

For the purposes of the transfer of the ISA wrapper under ISA regulations the date shown will be the transfer date.