COVENTRY Building Society

Cash ISA transfer request

From another ISA provider to Coventry Building Society

Transfer to Coventry Building Society cash ISA number | Account:

If you already have an ISA with Coventry Building Society complete this transfer request and return it to us. Alternatively, if you're opening a new ISA with us, you must complete an ISA application form as well as this transfer request. You should check whether the ISA you are transferring has any restrictions. For example you may only be able to transfer your whole investment or just the current tax year's subscriptions; this is the amount you have saved in this tax year. Also, there may be a charge to transfer your ISA funds, or you may need to give notice before the transfer can go ahead.

Personal details

Name

Permanent residential address

Country of residence

Date of birth ⓘ dd mm yyyy

National Insurance number (if you have one)

Telephone numbers:

Home | Work | Mobile

Email address

Current ISA provider

Name of existing ISA provider

ISA number

Sort code - -

Roll/Reference number (if applicable)

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Your transfer instructions

Have you subscribed to your cash ISA with the provider named above in the current tax year? Yes ☐ No ☐

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

Do you want to transfer all or part of your ISA investment from the provider named above to your Coventry Building Society cash ISA? All ☐ Part ☐

If **ALL**, does this include previous years' subscriptions? Yes* ☐ No ☐

If **PART**, do you wish this to include (select one only):

☐ All current year's subscriptions only

☐ All current year's subscriptions plus part previous years' subscriptions* Total amount £

☐ Previous year's subscriptions only All* ☐ Total amount £

* We will only process this instruction if the Coventry Building Society ISA you are transferring into accepts previous years' subscriptions. Check the Specific Terms of your Coventry Building Society ISA or contact us, before returning this form.

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 that the funds will be available to transfer within 30 days; **or**

☐ 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 terms and conditions of the ISA.

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 Coventry Building Society 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 terms and conditions.

I authorise my current ISA provider to

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

Signed

Date dd / mm / yyyy

Transfer acceptance – 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. dd / mm / yyyy

Coventry Building Society. Principal Office: Coventry House, Harry Weston Road, Binley, Coventry, West Midlands CV3 2TQ.