COVENTRY Building Society

ISA Internal Transfer Request form

For current and/or previous tax years' subscriptions

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

Your details

Title

First name(s)

Surname

Permanent residential address
(including postcode)

Date of birth dd / mm / yyyy

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 ☐			
All current year's plus part of previous	All ☐		£	
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 apply to subscribe to this Cash ISA for the current tax year and each successive year until further notice.
I declare that:

- all subscriptions made, and to be made, belong to me;
- I am 18 years of age or over;
- I have not subscribed, and will not subscribe, to more than the overall subscription limit* total in the same tax year;
- I am resident in the United Kingdom (UK) for tax purposes, or, if not resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the UK, or I am married to, or in a civil partnership with, a person who performs such duties;
- I will inform Coventry Building Society if I cease to be so resident or to perform such duties or to be married to, or in a civil partnership with, a person who performs such duties; and
- I agree to the ISA Specifc Terms and the Saving Accounts Terms and Conditions that apply to my ISA - please let us know if you would like a copy of these.

I authorise Coventry Building Society:

- to hold my cash subscription and ISA investments, in respect of the interest, dividends and any other rights or proceeds and to claim any relief from tax on my behalf.

I declare that the information given is correct to the best of my knowledge and belief.
I confirm the declaration and transfer authority above.

Signed

Date dd / mm / yyyy

*For more information on current ISA limits, please contact us.

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