

ISA Transfer Authority Form

This is an application form to transfer an existing Cash ISA or the monetary value of existing stocks and shares ISA into a Trading 212 ISA.

Please use BLOCK capitals only and blue and black ink, ticking the boxes where appropriate.

Personal information

Title	<input type="text"/>	Surname	<input type="text"/>
Forename(s)	<input type="text"/>		
Date of Birth	<input type="text"/>		
National Insurance Number	<input type="text"/>		
Trading 212 ISA account number *	<input type="text"/>		
Permanent residential address	<input type="text"/>		
	<input type="text"/>		
Postcode	<input type="text"/>	Telephone number	<input type="text"/>
Email address	<input type="text"/>		

**To initiate the process you should have a verified S&S ISA account. Please note, that you must not add funds if you have another active S&S ISA account for the current tax year.*

Declarations

I declare that:

- 1. I have read, understood and retained copy of the Trading 212 ISA terms and conditions.
- 2. I acknowledge that the details contained therein and this application form, constitute the agreement between me and Trading 212 UK Limited.
- 3. I understand that the transfers can take several weeks to complete and accept that Trading 212 UK Limited accepts no responsibility for any losses incurred as a result of any delays in the transfer to the Trading 212 ISA.
- 4. I understand and accept that I am fully responsible for any exit charge or other cost that my current ISA manager may impose in relation to the transfer.
- 5. I understand that the Trading 212 ISA account is a stocks and shares ISA.
- 6. I understand that Trading 212 only accepts transfer in form of cash, which means any stock holding has to be sold prior to transfer and I may suffer losses as a result of buying back the stocks sold.
- 7. The declaration and information contained in this form is correct to the best of my knowledge and belief and I undertake to notify Trading 212 UK Limited of any changes without delay.

Please print your name, sign and date below to confirm you have read and understood the above declarations.

Name

Date

Signature

ISA Transfer Authority

Please complete the authority for the ISA you wish to transfer. The transfer can only be made in form of cash (i.e any stock holdings has to be sold prior to transfer) from either a cash ISA or a stocks and shares ISA.

ISA reference of your existing account

ISA provider's name

ISA provider's address

Postcode

Type of ISA

(Cash or S&S ISA)

Transfer instructions

Current tax year ISA

I wish to make a full current year subscription transfer

Indicate the amount deposited for the current tax year

Previous tax year ISA (choose one)

I wish to make a full previous tax year(s) ISA(s) transfer

I wish to make a partial previous year transfer*

Indicate the partial balance which you wish to transfer

Total amount being transferred (approx.)

Name

Date

Signature

**Some providers might be unable to carry out partial transfers*