



ISA Transfer Authority

This form can be used to transfer your ISA to Wealthtime (a trading name of Novia Financial plc). You can complete this form digitally. Any required signatures can be provided online. Please upload the completed document to **Adviser Zone** and send it to us via secure email. If you don't have access to our selected electronic signature providers, please sign the declaration below using a blue or black pen and scan the form before sending it to us by secure email. Alternatively, you can send the form by post to **Wealthtime Client Services, PO Box 4328, Bath, BA1 0LR**.

1. Investor Details

☐ Mr ☐ Mrs ☐ Miss Other

Wrapper number:

Surname:

Date of birth (dd/mm/yyyy):

Forename(s):

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National Insurance number:

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Failure to provide your correct National Insurance number can make your ISA invalid and you will lose the tax benefits.

House number/name:

Street name:

District:

Town/city:

County:

Country:

Postcode:

Notes

Please use this space to provide any additional notes or information. Please do not use a separate cover letter for key information.

2. Details of your Existing Plan Manager

Plan to be transferred - Account number:

ISA Manager name:

Building number/name:

Street name:

Town/city:

County:

Country:

Postcode:

3. Details of Transfer

This is from a ☐ Cash ISA or ☐ Stocks and Shares ISA

☐ Partial transfer of: £ or full transfer of estimated: £

Amount contributed so far in this tax year: £

4. Declaration

- I authorise you to transfer my Investments in Cash when requested by Wealthtime and to provide them with any related information.
- If I sign this declaration by electronic signature I confirm that this method of signature is my agreement to be bound as if signed by my manuscript signature.

Print name:

Applicant signature:

Date (dd/mm/yyyy):

If you require this document in an alternative format please contact us.

Wealthtime is a trading name of Novia Financial plc. Novia Financial plc is a private limited company registered in England and Wales. No. 06467886. Registered office: Royal Mead, Railway Place, Bath, BA1 1SR. Novia Financial plc is authorised and regulated by the Financial Conduct Authority. FCA Number 481600.