

# ISA Transfer Authority Form

Complete this form to transfer your existing ISA into Wealthtime Select Stocks and Shares ISA.

## Your details

Mr <input type="radio"/>	Mrs <input type="radio"/>	Ms <input type="radio"/>	Miss <input type="radio"/>	Other <input type="radio"/>	If 'other' please state	<input type="text"/>
First name(s) in full	<input type="text"/>			Last name	<input type="text"/>	
Date of birth (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>			Permanent residential address	<input type="text"/>	
National Insurance number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				<input type="text"/>	
					<input type="text"/>	
					<input type="text"/>	
				Postcode	<input type="text"/>	

## Account to be transferred

Name of ISA	<input type="text"/>	Address of transferring ISA provider	<input type="text"/>
ISA account number	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
Sort code (if applicable)	<input type="text"/>		<input type="text"/>
Name of transferring ISA provider	<input type="text"/>	Postcode	<input type="text"/>

## Transfer details

I want to transfer my existing:

Cash ISA

☐

Please indicate as appropriate. I'd like you to:

Stocks and Shares ISA

☐

Sell the assets held in my existing ISA and transfer the cash proceeds to my Wealthtime Select ISA

☐

Innovative Finance ISA

☐

Arrange for the re-registration of assets held in my existing ISA to my Wealthtime Select ISA\*.

☐

\*Any re-registration of investments into your Wealthtime Select ISA will be subject to your existing ISA manager allowing this type of transfer and your investments being available on the Wealthtime Select funds list.

If it's not possible to re-register my existing ISA investments, please arrange for these to be sold and transferred in cash:

Yes ☐

No ☐

## Amount to be transferred

Please indicate as appropriate:

All current year subscriptions

☐

All previous years' subscriptions

☐

Specified amount (£)

## Transfer authorisation

I authorise you to:

- Transfer the proceeds of the above ISA, as soon as reasonably practical, to my Wealthtime Select ISA.
- Transfer the investments of the above ISA, as soon as reasonably practical, to my Wealthtime Select ISA.
- Provide Wealthtime Select with all relevant information relating to my ISA including, but not limited to, transaction and dividend history and details of the current portfolio and its value.

Signature

Date (dd/mm/yyyy)

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

Wealthtime and Wealthtime Select are trading names of Wealthtime Limited. Wealthtime Limited is a limited company registered in England and Wales. No. 06016480. Registered Office: 1 London Road Office Park, London Road, Salisbury SP1 3HP. Wealthtime Limited is authorised and regulated by the Financial Conduct Authority. FCA Number 468461.