

preparation is everything

# Cash ISA transfer instruction form

The ISA transfer process will take up to 30 days to complete.

This form will be sent by Scottish Widows Bank to your existing ISA provider as an instruction to transfer funds. Upon receipt of the funds Scottish Widows Bank will send you notification that the funds have been received and details of your new ISA account.

## A. About you

1. Your title Mr  Mrs  Miss  Ms  Other  (please specify)

2. Your surname

3. Your first name(s)

4. Your address

Postcode

5. National Insurance Number   
(You'll find your National Insurance (NI) number on a pay slip, pension book, p60, p45 or tax return. If in doubt, ask your employer or tax office. Unfortunately we can't open an ISA for you if you can't provide your NI number).

6. Your date of birth (DD MM YYYY)

## B. Details of the cash ISA to be transferred

1. ISA provider

2. Address

Postcode

3. Telephone number (Including area code)

4. Existing account number

Do you want to transfer all or part of your existing savings? All  Part  Please transfer £

If you are transferring money from your current tax year ISA, you must transfer the full amount.

### Transfer Authority

I authorise you to provide Scottish Widows Bank with any information they require about the cash ISA detailed on this form, and to transfer it to them via the above methods.

Signature  Date (DD MM YYYY)

### Payment Options (For existing ISA company's use)

Please make payment to Scottish Widows Bank via the following methods:-

- Cheque payable to "Scottish Widows Bank – Customer's Name"
- BACS Payment to Scottish Widows Bank **Sort Code 30-18-05**, **A/C No 00030267**, quoting the customer's name and Scottish Widows Bank ISA account number.