

# Proplend IFISA Transfer In Form



For transferring a Cash ISA or IFISA from another ISA provider

## 1. Personal Details

Title

First Names

Surname

Proplend IFISA Lender ID

(On your ISA lender dashboard - Format LENDxxxx-ISAxxx)

Permanent Residential Address

County / Postcode

Contact Email Address

Telephone Number

Date of Birth

Day    Month    Year DD/MM/YYYY

National Insurance Number (NINO)

*Your NINO can usually be found on a payslip, P45, P60 or on any correspondence from HMRC. If you are unable to locate your NINO please contact HMRC.*

*If you do not currently hold a NINO, please declare your NINO as XX999999X*

*For further details concerning your National Insurance Number please refer to the IFISA Terms and Conditions.*

## 2. Current (Transferring) ISA Manager Details

ISA Provider

ISA Provider Address

Postcode

Existing ISA Reference

Sort Code (Cash ISA only) - -

Account Number (Cash ISA only)

Roll Number (if applicable)

### 3. Transfer Instructions

Type of Transfer  All  Partial

(Please tick 'All' or 'Partial' (not both). If ticking 'All' there is no need to complete the partial transfer type question )

Partial Transfer Type  Current Tax Year  Previous Tax Years

(Only indicate Current and/or Previous tax year above if you indicated 'Partial' as type of transfer in the previous question.  
Please note: If you choose to include current tax year 'subscriptions' in your partial transfer, you must transfer all of those subscriptions.

Estimated Transfer Value or Partial Transfer Amount £

Have you subscribed in the current tax year? £

### 4. Authority to Transfer

I declare that:

- I agree to the ISA Terms and Conditions;
- The transfer authority has been completed to the best of my knowledge;
- I authorise my existing ISA Manager to sell investments and transfer the ISA in cash as instructed above and
- I authorise the existing ISA Manager to provide details regarding the above mentioned ISA upon request to the receiving provider, Proplend.

In the event that the instructions are not compatible with the existing ISA Manager's transfer process, I instruct Proplend to amend the request appropriately after first contacting me

Date      Month      Year  
DD        MM        YYYY

Your signature - 'wet' signature required

**Please now print and sign your fully completed transfer in form before sending it to Proplend:**

**Proplend ISA Transfers Department, 15 Little Green, Richmond, TW9 1QH**