

Proplend IFISA Transfer In Form



For transferring a Stocks and Shares ISA from another ISA provider

1. Personal Details

Title

First Names

Surname

Proplend IFISA Lender ID

(On your ISA 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 – Stocks and Shares

ISA Provider

ISA Provider Address

Postcode

Existing Plan Number/Reference

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? £

Please check with your existing ISA Manager that the required option is permitted. You may need to contact your existing ISA Manager to arrange what to sell in order to raise the required amount.

Please note; we only accept transfers in Cash. The investments will need to be sold prior to transfer

In order to raise the cash for a partial transfer, your existing ISA Manager may require you to specify which investments need to be sold. Please liaise with them and complete the details below.

Please indicate the following:

- (a) Type of investment or name of fund;
- (b) The investment indicator reference
- (c) Amount of shares to sell, please specify 'All' if you wish to sell the entire holding
- (d) The minimum value to raise; if this is required
- (e) If there is a redemption date, please specify if you are willing to wait for this or whether you require an immediate sale. There may be a penalty for an early sale

Investment Type or Fund Name	ISIN or Sedol (if known)	Amount of shares	Minimum Value (£) - if required
---------------------------------	-----------------------------	---------------------	------------------------------------

In the event that any holdings or plans have a redemption date I authorise:

Immediate sale (this could incur a penalty)

Wait for the full term

(Please tick 'Immediate Sale' or 'Wait for the full term' (Not both).

Do you wish to transfer un-invested cash?

Estimated value of cash £

Where do you require residual income to be paid?

Into the new ISA with Proplend

Direct to your nominated bank account

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