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**ISA Transfer Form**

This form lets you transfer an existing ISA into an ISA with YOUR Platform.

Seccl Custody Limited (SCL) is the ISA Manager in respect of YOUR ISA. SCL is approved by HM Revenue & Customs for this purpose. YOUR ISA, managed by SCL, is a stocks and shares ISA.

If you do not already have a YOUR ISA you will need to apply for one before submitting this form.

**Your details**

|  |  |
| --- | --- |
| Title (if any) |  <<Insert Details>>  |
| Full name |  <<Insert Details>>  |
| National insurance number  |  <<Insert Details>>  |
| Date of birth |  <<Insert Details>>  |
| Email address |  <<Insert Details>>  |
| Permanent residential address    |  <<Insert Details>>  |
| YOUR Platform ISA account number |  <<Insert Details>>  |

**ISA Transfer Authority**

|  |  |
| --- | --- |
| Current ISA provider  |  <<Insert Details>>  |
| Current ISA reference / account number |  <<Insert Details>>  |
| Type of ISA with current provider |  <<(cash or stocks and shares)>>  |
| Partial or full transfer? |  <<Insert Details>>  |
| Amount to transfer (if partial) |  <<Insert Details>>  |
| In-specie or cash? |  <<Cash>>  |

**Declaration**

I declare that:

* I have read and understood YOUR Platform terms and conditions and key features document;
* I give authority to YOUR Platform and ISA manager (Seccl Custody Ltd) to transfer my ISA;
* Information provided in this application is correct to the best of my knowledge. I will notify YOUR Platform of any changes to the information provided;
* I accept that YOUR Platform will not be liable to any losses incurred as a result of any delays in the transfer to my YOUR ISA;
* I am the beneficial owner of any assets being transferred and will remain so once the asset have moved into YOUR ISA;
* I accept that YOUR Platform will not be liable to any costs or fees levied by the existing ISA Manager;

**Transfer Instruction**

I hereby authorise my existing ISA provider to:

* Transfer my existing ISA as specified to YOUR ISA;
* Provide any information necessary to YOUR Platform and SCL to facilitate the transfer;
* Cancel any direct debits currently in place with immediate effect if I have chosen to transfer my current tax years subscriptions;
* Deduct any charges for the transfer as specified within your terms and conditions.

I have read and agreed to the declaration above:

|  |  |
| --- | --- |
| Name  |  <<Insert Details>>  |
| Date |  <<Insert Details>>  |
| Signature |  <<Insert>>  |

|  |  |
| --- | --- |
| Adviser Name |  <<Insert Details>>  |

**Transfer Acceptance**

*For the attention of the ceding provider.*

Please make the payment to the following details:

Account Name: Seccl Custody

Account Number: 17190968

Sort Code: 308012

Payment Reference: INVST - <<YOUR Platform ISA account number >>

**Please note: we do not accept cheques or postal forms.**

Please send all correspondence relating the transfer to Questions@YOUR-Platform.co.uk and transfers@seccl.tech.

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