Logo, company name

Description automatically generated**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) |  |
| Full Name |  |
| National Insurance Number |  |
| Date of Birth |  |
| Email Address |  |
| Permanent Residential Address |  |
| YOUR Platform ISA Account Number |  |

**ISA Transfer Authority**Logo, company name

Description automatically generated

|  |  |
| --- | --- |
| Current ISA Provider |  |
| Current ISA reference / Account number |  |
| Current provider ISA Type - cash or stocks & shares? |  |
| Partial or full transfer? |  |
| Amount to Transfer |  |
| In-specie or cash? |  |

**Declaration**Logo, company name

Description automatically generated

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 Limited) 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 assets 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 |  |
| Date |  |
| Signature |  |

|  |  |
| --- | --- |
| Adviser Name |  |

**Transfer Acceptance**Logo, company name

Description automatically generated

*For the attention of the ceding provider*

Please make the payment to the following details:

Account Name: Seccl Custody

Account Number: 17190968

Sort Code: 30-80-12

Payment Reference: INVST- <<YOUR Platform ISA Account Number >>

**Please note: We do not accept cheques or postal forms**

Please send all correspondence relating to the transfer to [Questions@YOUR-Platform.co.uk](mailto:Questions@YOUR-Platform.co.uk) and [Transfers@seccl.tech](mailto:Transfers@seccl.tech)

Seccl Custody Limited is the custodian of assets held on the platform and is authorised and regulated by the Financial Conduct Authority, Registration No. 793200 and registered in England and Wales No. 10430958. Registered office 20 Manvers Street, Bath BA1 1JW.