|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **INTERNAL CASH ISA TRANSFER FORM**  FM3D / 08/22 | | | | | | | | |
|  | **Full name (inc. title):** | |  | | | | |  |
|  | **Permanent residential address.:** | |  | | | | |  |
|  | **Daytime tel:** | |  | | | | |  |
| **Information about the ISA being transferred** to be completed by the ISA investor | | | | | | | | |
|  | **Existing Cash ISA account number:** | | |  | | | |  |
|  | **Amount subscribed to this Hinckley & Rugby Cash ISA in current tax year (if applicable):** | | |  | | | |  |
|  | **Date of first subscription in current tax year if applicable:** | | |  | | | |  |
| **Transfer Details**  Please select either,  I would like to **close my existing Cash ISA** with Hinckley & Rugby and transfer the balance, including accrued interest to Cash ISA account number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_    I would like **to transfer part of my existing Cash ISA** with Hinckley & Rugby to  Cash ISA account number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ The total amount I would like to transfer is £\_\_\_\_\_\_\_\_\_\_  I authorise Hinckley & Rugby Building Society   * To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash * To make on my behalf any claims to relief from tax in respect of ISA investments   I agree to the ISA terms and conditions and declare that the Cash ISA application form has been completed to the best of my knowledge and belief. | | | | | | | | |
|  | **Signature:** |  | | | **Date:** |  |  | |
|  | | | | | | | | |
| **FOR OFFICE USE ONLY**  **Branch:**  First Subscription Date correct  Forms Taken By:                               Branch:                           Date:                     Checked by:  **Savings Dept**:  Date Transfer Actioned:                   Actioned By:                     Date:             Checked by: | | | | | | | | |