

# CASH ISA TRANSFER

Office use only

WEB

**Application to transfer existing Cash ISAs to the HL Vantage Cash ISA**

## Section 1 PERSONAL DETAILS - Please complete all sections

Title (Mr, Mrs etc)	Full Forenames	Surname
Permanent Residential Address		
	Postcode	Daytime Tel. No
		Date of Birth / / 19
Email Address (if applicable)	National Insurance No.	If you have no NI No. tick here <input checked="" type="checkbox"/>

## Section 2 PAPERLESS REPORTING SERVICE

Please tick this box if you would like to receive your statements, contract notes and other account information electronically rather than by post. If you have not yet registered for online access we will send you further details about registering when you apply.

## Section 3 NOMINATED BANK ACCOUNT & INTEREST INSTRUCTION - Please see the Terms & Conditions for further details

Please nominate a bank account into which we will pay any income or cash withdrawals. You need not complete this section if you have already nominated a bank account.

Name of Account Holder	
Sort Code - -	Account Number
Roll Number or Building Soc.Ref.	

Please complete this section if this is your first application for, or to change the current interest instruction on, the Vantage Cash ISA.

<input checked="" type="checkbox"/> <b>A</b>	<b>HOLD INTEREST WITHIN MY CASH ISA</b>
<b>OR</b>	<b>TICK ONE ONLY</b>
<input checked="" type="checkbox"/> <b>B</b>	<b>PAY INTEREST OUT TO MY NOMINATED BANK ACCOUNT</b>

## Section 4 SIGNATURE & DECLARATION

For your own benefit and protection you should read our Terms & Conditions carefully before committing to an investment. If you do not understand any point please ask us for further information. When you use our services we will take this as acceptance and agreement of our terms, and you will be bound by them.

I have read, agreed to and retained the Terms & Conditions, the Important Investment Notes, and Key Features of the Vantage ISA and my chosen investment(s). The declaration and the information I will give in my application is correct to the best of my knowledge and belief and shall be the basis of the contract between me and Hargreaves Lansdown. I will notify Hargreaves Lansdown without delay of changes to these particulars. I have not received, and will not receive, advice from Hargreaves Lansdown.

I authorise Hargreaves Lansdown: (a) To hold my cash subscriptions, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash. (b) To make on my behalf any claims

to relief from tax in respect of ISA investments. I have not subscribed, and will not subscribe more than the overall subscription limit in total to a Stocks & Shares ISA and a Cash ISA in the same tax year. I have not subscribed, and will not subscribe, more than the Cash ISA limit to a Cash ISA. I declare that I am 18 years of age or over.

If applicable I understand that I will be giving up membership rights if my existing provider is a mutual organisation.

I agree to the declaration above

<input checked="" type="checkbox"/> PLEASE SIGN HERE	Date
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## Section 5 CASH TRANSFER AUTHORITIES Please complete one authority for each Cash ISA you wish to transfer

**A** Please detail existing holdings to be transferred to the HL Vantage Service:

Cash ISA Manager's Name	
Existing Cash ISA Reference/ Account No. to be transferred	
<input type="checkbox"/> ENTIRE CASH ISA <b>OR</b> <input type="checkbox"/> PARTIAL TRANSFER (Amount specified)	
Approx. Transfer Value (£)	Provider's Postcode
Please take this authority to transfer my Cash ISA to Hargreaves Lansdown immediately. I also authorise you to discuss this transfer with Hargreaves Lansdown by telephone.	
Signature <input checked="" type="checkbox"/>	Date <input checked="" type="checkbox"/>
Full Name (BLOCK CAPITALS)	Postcode
Regular Savings - Cease collection of my monthly savings plan with immediate effect if I have chosen to transfer my ISA for the current tax year.	

**B** Please detail existing holdings to be transferred to the HL Vantage Service:

Cash ISA Manager's Name	
Existing Cash ISA Reference/ Account No. to be transferred	
<input type="checkbox"/> ENTIRE CASH ISA <b>OR</b> <input type="checkbox"/> PARTIAL TRANSFER (Amount specified)	
Approx. Transfer Value (£)	Provider's Postcode
Please take this authority to transfer my Cash ISA to Hargreaves Lansdown immediately. I also authorise you to discuss this transfer with Hargreaves Lansdown by telephone.	
Signature <input checked="" type="checkbox"/>	Date <input checked="" type="checkbox"/>
Full Name (BLOCK CAPITALS)	Postcode
Regular Savings - Cease collection of my monthly savings plan with immediate effect if I have chosen to transfer my ISA for the current tax year.	

**C** Please detail existing holdings to be transferred to the HL Vantage Service:

Cash ISA Manager's Name	
Existing Cash ISA Reference/ Account No. to be transferred	
<input type="checkbox"/> ENTIRE CASH ISA <b>OR</b> <input type="checkbox"/> PARTIAL TRANSFER (Amount specified)	
Approx. Transfer Value (£)	Provider's Postcode
Please take this authority to transfer my Cash ISA to Hargreaves Lansdown immediately. I also authorise you to discuss this transfer with Hargreaves Lansdown by telephone.	
Signature <input checked="" type="checkbox"/>	Date <input checked="" type="checkbox"/>
Full Name (BLOCK CAPITALS)	Postcode
Regular Savings - Cease collection of my monthly savings plan with immediate effect if I have chosen to transfer my ISA for the current tax year.	

**D** Please detail existing holdings to be transferred to the HL Vantage Service:

Cash ISA Manager's Name	
Existing Cash ISA Reference/ Account No. to be transferred	
<input type="checkbox"/> ENTIRE CASH ISA <b>OR</b> <input type="checkbox"/> PARTIAL TRANSFER (Amount specified)	
Approx. Transfer Value (£)	Provider's Postcode
Please take this authority to transfer my Cash ISA to Hargreaves Lansdown immediately. I also authorise you to discuss this transfer with Hargreaves Lansdown by telephone.	
Signature <input checked="" type="checkbox"/>	Date <input checked="" type="checkbox"/>
Full Name (BLOCK CAPITALS)	Postcode
Regular Savings - Cease collection of my monthly savings plan with immediate effect if I have chosen to transfer my ISA for the current tax year.	