

Lifetime ISA Transfer Form

Application to transfer existing Lifetime ISAs to the Vantage Lifetime ISA.

Office use only
WEBK

Please note, if you are transferring a different type of ISA then a different form is required.

Important information

- The first bonus will be paid into the Lifetime ISA within 28 days of 6 April 2018, thereafter it will be paid within 4 to 9 weeks of the subscription.
- If you make a withdrawal from the Lifetime ISA before 6 April 2018, other than in terminal ill health, your Lifetime ISA will be void and no bonus will be paid.
- From 6 April 2018 you will be able to withdraw money from your Lifetime ISA for an eligible house purchase, from age 60 or during terminal ill health. You must have held a Lifetime ISA for at least 12 months before you can make an eligible house purchase.

- If you withdraw money for any other reason after 6 April 2018 a 25% government withdrawal charge will be applied. This will be charged on the full withdrawal amount, so you could receive less than you have paid in. This will not apply in the 2017/18 tax year.
- If saving in a Lifetime ISA instead of enrolling in, or contributing to, a qualifying pension scheme, occupational pension scheme, or personal pension scheme: (i) You may lose the benefit of contributions by an employer (if any) to that scheme; and (ii) Your future entitlement to means tested state benefits (if any) may be affected.

Please see the Key Features of the Vantage Lifetime ISA for more details.

1. Personal Details - please complete all sections, including date of birth and national insurance number, in BLOCK CAPITALS where applicable

Title (Mr, Mrs etc)	Full Name																				
Permanent Residential Address												Postcode									
Date of Birth	D	D	M	M	Y	Y	Y	Y	Email Address*												
Daytime Tel. No								Nationality				National Insurance No.									

* You can request not to receive emails from Hargreaves Lansdown by writing to us or emailing us.

2. Nominated Bank Account & Income Instruction

You need not complete this section if you have already nominated a bank account.

Please complete this section only if this is your first application for, or to change the current income instruction on, the Vantage Lifetime ISA. **Please tick one option only.**

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

- ☒ **Reinvest income automatically**
- ☒ **Hold income on deposit in my Lifetime ISA**

3. Declaration - please ensure you have read and agree to this declaration before you transfer.

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. I apply to subscribe for a Lifetime ISA for the tax year 2017/18 (the first tax year to which this declaration relates) and this declaration shall have effect for each year in which I make a payment to this Lifetime ISA, except that after the account has been opened the reference to age 40 below is deemed to be to age 50. I have read, agreed to and retained the Terms & Conditions, the Important Investment Notes, and Key Features of the Vantage Lifetime ISA and my chosen investment including all costs and charges and, where available, the Simplified Prospectus or Key Investor Document/Key Information Document provided to me on paper or via www.hl.co.uk.

I declare that all subscriptions of money made, or to be made, belong to me and that I am 18 years of age or over and either under the age of 40 or the account is being opened to receive a transfer of subscriptions from another Lifetime ISA, a defaulted Lifetime ISA subscription or a returned withdrawal after a failed first time residential purchase. I have not subscribed, and will not subscribe, more than the overall subscription limit in total to any combination of permitted ISAs in the same tax year. I have not made, and will not make, current year payments which exceed the Lifetime ISA payment limit in the same tax year. I have not made, and will not make, current year payments or transfers from a Help to Buy ISA to another Lifetime ISA in the same tax year that I make current year payments to this Lifetime ISA. (Other than for accounts opened to receive investments from another Lifetime ISA, a defaulted

Lifetime ISA subscription or a returned withdrawal after a failed first time residential purchase) I am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Hargreaves Lansdown Asset Management (HLAM) if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

I authorise HLAM: (a) To hold my cash payments, Lifetime ISA investments, interest, dividends and any other rights or proceeds (including any government bonus) in respect of those investments and cash; (b) To make on my behalf any claims to relief from tax in respect of Lifetime ISA investments; (c) To submit Lifetime ISA bonus claims to HMRC on my behalf; (d) To withhold and deduct from a balance in the Lifetime ISA and pay to HMRC any charges due to withdrawals or any wrongly paid amount of Lifetime ISA bonus; and (e) To make a record in writing in accordance with Regulation 12B paragraph (9)(a) of the Individual Savings Account regulations where that paragraph requires HLAM to do so.

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 HLAM. I will notify HLAM without delay of changes to these particulars. I confirm that I have not received advice from HLAM in relation to the opening of this Lifetime ISA.

4. ISA Transfer Authorities - please complete one authority for each ISA you wish to transfer.

ISA Company's Name	Postcode	ISA Reference to be transferred	Approx Transfer Value £
LIFETIME ISA			
Please transfer my entire Lifetime ISA to the Vantage Lifetime ISA as:		<input checked="" type="checkbox"/> Stock OR <input checked="" type="checkbox"/> Cash	I authorise you to transfer my investment(s) as stock if I have not ticked either box.
I authorise you to discuss this transfer with Hargreaves Lansdown, including by telephone. I have read and agreed to the declaration above.			
PLEASE SIGN HERE ✕	DATE ✕	Full Name	Postcode
Regular Savings - cease collection of my monthly savings plan with immediate effect.			
Please only complete this section if you are transferring your Lifetime ISA as cash to the Vantage Lifetime ISA. Please invest the cash transfer as follows:			
	%		%
	%		%
	%	CASH to be held pending investment instruction	%
	%		100 %
Please include a covering letter if you require additional space to list investment instructions.			