

ISA Transfer Form



To transfer a cash ISA to us, please first open the Newcastle Building Society cash ISA to receive your funds then complete this form. This form should only be used for transferring existing cash ISAs to Newcastle Building Society.

Please complete all parts of this form. Failure to do so, may result in a delay of the transfer. Should you require a transfer from a stocks & shares ISA to a cash ISA, please contact us on 0345 734 4345. We are open 8am - 6pm, Monday to Friday.

Section 1 - Customer Details	Customer Details Please complete all sections in this column Newcastle Building Society Account Number or Application Reference No:	Customer Details Guide: To help identify you quickly, enter your details ensuring each box in the grey section opposite using black ink . Use upper-case for alphabetical characters. Examples are provided below.	
	A <input type="text"/>	A - Ensure your Account Application Reference is entered in the format displayed.	NEWCASTLE BUILDING SOCIETY ACCOUNT NUMBER OR APPLICATION REFERENCE NO
	B <input type="text"/>	B - Provide your first name as it appears on your account.	JOHN
	C <input type="text"/>	C - Provide your surname as it appears on your account.	SMITH
	D <input type="text"/>	D - Ensure your Date Of Birth is entered in the following format.	01/02/1980
	E <input type="text"/>	E - Enter your National Insurance number in the following format.	A B - 1 2 3 4 5 6 - C
Section 2 - ISA Transfer Details	ISA Transfer Details Existing Provider Name:	ISA transfer details guide: To minimise delays to your transfer, enter your details ensuring relevant sections highlighted in grey bold are completed using black ink .	
	G <input type="text"/>	G - Enter the name of your existing ISA provider.	HALIFAX
	H <input type="text"/>	H - Enter your ISA's sort code in the following format.	1 2 - 3 4 - 5 6
	I <input type="text"/>	I - Enter your ISA's 8 digit account number.	1 2 3 4 5 6 7 8
	J <input type="text"/>	J - Enter the roll or reference number of your ISA. If you are unsure of this you may wish to confirm this with your existing provider.	
	K <input type="text"/>	K - Clearly indicate by ticking one of the boxes provided whether you want to close your ISA and transfer all funds including unpaid interest (All) or whether you wish to transfer a partial amount (Part).	
Section 3 - Authorisation	Important Note - HMRC timescales for a Cash ISA transfer is 15 business days , should your ISA transfer exceed this timescale then interest will be backdated from the 16th business day so long as the information provided above is correct .		
	Authorisation I authorise my existing ISA provider to transfer my Cash ISA to Newcastle Building Society and share relevant information with them. I also authorise my existing ISA provider to follow Newcastle Building Society's instructions regarding the transfer. If notice is required to close or transfer the ISA, or it contains a fixed-term deposit that hasn't matured, I instruct my provider to:		
	1. Wait for the full notice period to end or wait until maturity (whichever is applicable) before going ahead with the transfer.	1	<input type="checkbox"/>
	OR		
	2. Depending on the terms and conditions of my account, carry out the transfer as soon as possible. I accept any consequential loss of interest or charges that may be applied.	2	<input type="checkbox"/>
	Signature: <input type="text"/>	Ensure all information provided above is accurate, if satisfied sign and date, our postal address can be found below:	
Date: <input type="text"/>	NEWCASTLE BUILDING SOCIETY 1 COBALT PARK WAY WALLSEND NE28 9EJ		