

(To be completed in conjunction with Customer Acceptance Form)

This form should only be used for transferring existing Cash ISAs to Newcastle Building Society. Should you require a transfer from a Stocks & Shares ISA to a Cash ISA, please contact us on **0345 734 4345***.

INFORMATION ABOUT THE CUSTOMER (TO BE COMPLETED BY THE ISA CUSTOMER)

Newcastle Building Society Ref No. (If you have applied for this account online, please provide your application reference number).

Title First Name(s) Surname

Date of Birth National Insurance Number (If you do not have one, please call us on 0345 600 4368*)

Permanent Residential Address

Postcode Contact Telephone Number (inc area code)

INFORMATION ABOUT THE ISA TO BE TRANSFERRED (TO BE COMPLETED BY THE ISA CUSTOMER)

Name of existing ISA Provider

Account Number Sort Code

Roll or Reference Number (if applicable) of existing ISA to be transferred

Please Note

The terms and conditions of some ISA products do not allow partial ISA transfers. Your existing provider may need you to give them specific information before the transfer can go ahead. Please check with your existing ISA provider if you are not sure about this.

1. Do you want to transfer all or part of this cash ISA?. If 'all', then ignore questions 3 and 4.

All ☐ Part ☐

2. Have you subscribed to this cash ISA in the current tax year?

Yes ☐ No ☐

PARTIAL TRANSFERS

3. If you have answered YES to question 2 and are transferring part of your ISA, do you want to include the subscription from the current tax year?

Yes ☐ No ☐ N/A ☐

Please note that the amount in your account representing current tax year subscriptions can only be transferred in whole and not in part.

4. If you are transferring part of your ISA, please state the total amount to transfer (including current year subscriptions) £

OR, if you only want to transfer your subscriptions from the current tax year, tick here. ☐

IMPORTANT INFORMATION REGARDING YOUR ISA(s)

To help you take advantage of your full tax free allowance, the Newcastle Building Society allows you to invest in a number of ISA products with the Society in this tax year. The combined funds held for the current tax year must not exceed your current Cash ISA annual allowance. (You must not subscribe to an ISA held with another provider).

TRANSFER AUTHORITY

I authorise my existing ISA Provider to transfer the ISA (account number above) to **Newcastle Building Society**.

I authorise my existing ISA Provider to provide **Newcastle Building Society** with any information, written or non-written, about the cash ISA and to accept any instructions from them relating to the cash ISA being transferred.

Where I must give notice to close or transfer part of the existing cash ISA, or the existing cash ISA holds a fixed-term deposit that has not yet reached its maturity date, I instruct my existing ISA provider to either:

1. Wait for the full notice period to end or wait until the scheduled maturity date (as appropriate) before this instruction can be processed. Please note the Newcastle reserves the right to refuse any funds after the date the product is withdrawn. ☐

2. Proceed immediately with the transfer and I will bear any consequential loss of interest or any other charge which may be applied. ☐ **OR**

3. Proceed immediately with the transfer, as the ISA I am transferring does not have a notice period or withdrawal penalties. ☐

Signed Date

Please note that a failure to complete this form fully may result in a delay in the transfer.

Please return your completed Cash ISA Transfer Form either to your local branch or to the following address:

Newcastle Building Society, 1 Cobalt Park Way, Wallsend, NE28 9EJ.

If you need any help or have any queries please call the Newcastle on 0345 734 4345* or visit your local branch.

*Lines are open 8am - 6pm Monday to Friday. We may monitor and record calls for training and security purposes.