

# Cash ISA Transfer Form



Request to transfer cash ISA savings to The Cambridge Building Society

**PLEASE USE BLOCK CAPITALS TO COMPLETE THIS FORM. ALL FIELDS WITH \* ARE REQUIRED**

- Please return this form, with a completed cash ISA application form (if applicable) to either one of our stores or our Head Office, FREEPOST THE CAMBRIDGE BUILDING SOCIETY
- This form will then be sent to your current ISA provider to start the transfer
- If you have any questions, please feel free to contact us on 0345 601 3344
- To transfer a Stocks and Shares ISA to The Cambridge you must complete a Stocks and Shares ISA Transfer Form

## Applicant Details

Title \*

Forename(s) \*

Surname \*

Date of birth \*

National Insurance number \*

Address \*

Postcode \*

Contact tel no. \*

Email address \*

## Information about the ISA you want to transfer

Existing ISA provider \*

ISA provider address \*

ISA provider sort code \*

ISA provider account number \*

ISA account number/reference \*

**The current Terms and Conditions at The Cambridge mean if you want to transfer money you've invested in an ISA during the current year, you must transfer all of it. Previous tax year deposits can either be partially or fully transferred (subject to your existing ISA provider's term and conditions)**

Have you subscribed to your existing ISA in this current tax year? Yes  No

If yes, please confirm the amount you have subscribed this year

Do you want to transfer all or part of your ISA? All  Part

Approximate balance to be transferred

If transferring part of your ISA, please select one of the following and provide the total amount to be transferred if required:

Previous year's subscription only

Amount to be transferred

Current year's subscriptions and part of the previous year's subscription

Amount to be transferred

Current year subscription only

Must be transferred in full

## Consent and Declaration

I authorise my existing ISA provider to transfer the cash ISA (account number overleaf) to The Cambridge Building Society. I authorise my existing ISA provider to provide The Cambridge Building Society with any information 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 contains a fixed-term deposit that has not reached its maturity date, I instruct my existing cash ISA provider to either (please tick one box below):

Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer, **or**

Depending on the terms and conditions, carry out the transfer as soon as possible – I will accept any consequential loss of interest or charges which may be applied

Signed

Date

**Before sending this form to us, please check that you have completed all the details and signed it.**

## TO BE COMPLETED BY THE CAMBRIDGE BUILDING SOCIETY

### Transfer Acceptance

We are willing to accept this cash ISA transfer in line with the customer's instructions above, as long as the following conditions are met:

- We do not accept partial transfers of current years subscriptions
- The transfer proceeds are made up of cash deposits only
- Where the customer has requested to transfer current year subscriptions these must not be more than the annual ISA allowance

### To be completed by store / Customer Contact Centre

ISA transfer to be credited to account number

Store name

#### Head Office Administration Centre

51 Newmarket Road, Cambridge CB5 8EG  
thecambridge@cambridgebs.co.uk 0345 601 3344

[cambridgebs.co.uk](http://cambridgebs.co.uk)

The Cambridge Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Registration Number 157223  
[www.fca.org.uk/register](http://www.fca.org.uk/register)