

Please complete sections 1, 2 and 3 if you wish to transfer your existing ISA to Melton Building Society. If you wish to transfer ISAs from different providers, you must complete an authority form for each transfer request. Transferring your Cash ISA from one institution to another can take up to 15 business days, and in some circumstances may take longer. We will work with your current ISA provider to do the transfer as quickly as possible. Please note that we do not allow transfers of Stocks & Shares ISAs. Your new Cash ISA account number will need to be included on the ISA Transfer Authority Form (otherwise it may delay processing)

## 1. Personal information

Title  Surname

Forenames

Date of Birth  -  -  National insurance number

Permanent Residential Address   
  
 Post Code

Contact Telephone Number

## 2. Information about the Cash ISA to be transferred

Name of existing ISA manager

### 2a Cash ISA transfer

Account number  Sort Code  -  -

Roll number

Have you subscribed to your existing ISA in the current tax year? YES  NO

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

Please select one of the following options to confirm how much you wish to transfer:

1. If you only wish to transfer current year subscriptions (in full) plus interest, tick here (only whole transfers of current tax year subscriptions and interest can be accepted)
2. If you wish to transfer the whole balance (including accrued interest) tick here

**2a Cash ISA transfer (continued)**

3. If you wish to transfer part of the balance, please confirm the amount (please check with your existing ISA manager that they will allow partial transfers)

£  .

including current year subscriptions

excluding current year subscriptions

4. If you wish to transfer previous years subscriptions only tick here

**Please note that we do not accept transfers from Stocks & Shares ISA.**

**3. Transfer authority**

If you wish to transfer into an existing Melton Building Society Cash ISA, please provide the account number:

If a new Melton Building Society ISA is to be opened, please indicate that a completed application form is enclosed:

I authorise my existing ISA provider to transfer the Cash ISA (account number in section 2) to Melton Building Society. I authorise my existing ISA provider to provide Melton Building Society with any information about my Cash ISA and to accept any instructions from them relating to the Cash ISA being transferred. Please tick the most appropriate box:

1. No notice is required for transfer or closure

Where I must give notice to close or transfer part of the existing Cash ISA in accordance with the terms and conditions applying to that account, or the existing Cash ISA contains a fixed-term deposit that has not reached its maturity date, I instruct my existing ISA provider to either:

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

**Please note Melton Building Society fixed rate products can be withdrawn without notice and deposits may be returned.**

or

3. carry out the transfer as soon as possible – I will accept any loss of interest or exit charges that may be applied in accordance with the terms and conditions applying to that account

Signed

Date  /  /

**Transfer Acceptance – For MMBS Internal Use Only**

On behalf of Melton Building Society, we are willing to accept this Cash ISA transfer in line with the customers instructions, as long as the

value is transferred as cash and we receive the transfer proceeds no later than  /  /

For the purposes of the transfer of the ISA wrapper under the ISA regulations, the date shown below will be the transfer date.

Name

Signed

Date  /  /