

# Cash ISA Transfer Authority Form

This form is available in large print. Please call 01282 440500\* or send an email to [savingsonline@themarsden.co.uk](mailto:savingsonline@themarsden.co.uk) and we'll be happy to send you a copy.

## 1. Information about you

Title	<input type="text"/>
Full forename(s)	<input type="text"/>
Surname	<input type="text"/>
Date of birth	<input type="text"/>
National Insurance Number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Permanent home address	<input type="text"/> <input type="text"/>
Postcode	<input type="text"/>
Contact telephone number (including area code)	<input type="text"/>
Email address	<input type="text"/>

## 2. Information about the Cash ISA you want to transfer

Name of existing Cash ISA provider	<input type="text"/>
Sort code	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>
Account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Roll number (if applicable)	<input type="text"/>

**Please note, we do not accept Stocks & Shares to Cash ISA transfers.**

The terms and conditions of some ISA products do not allow only part of an ISA to be transferred. 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're not sure about this.

Do you want to transfer all or part of this Cash ISA?	All	<input type="checkbox"/>	Part	<input type="checkbox"/>		
If you're asking to transfer part of your Cash ISA, please tell us how much of your Cash ISA you want to transfer.				£ <input type="text"/>		
Have you subscribed to this Cash ISA in the current tax year?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>		
If you've answered yes to the above and are transferring part of your Cash ISA, do you want to include the subscription from the current tax year?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	N/A	<input type="checkbox"/>

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

## 3. Transfer authority

I authorise my existing Cash ISA provider to transfer the Cash ISA (account number above) to Marsden Building Society. I authorise my existing Cash ISA provider to provide Marsden 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: (tick appropriate box)

- 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

Please return the completed and signed form via email to [savingsonline@themarsden.co.uk](mailto:savingsonline@themarsden.co.uk). If your email provider asks if you want to reduce the image size, please select 'keep original size' as we need the full size version to forward to your current provider.

**4. Transfer acceptance (for Marsden use only)**

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.

- The transfer proceeds are made up of cash deposits only
- We must receive the transfer proceeds no later than
- Where the customer has shown above that they want to transfer subscriptions from the current tax year, these must not be more than:  £

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

Date

Name of new provider



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