

Thank you for requesting to transfer your cash ISA to Yorkshire Building Society.

PLEASE NOTE - WE ONLY ACCEPT CASH ISA FUNDS.

Return this section to your local Yorkshire Building Society branch with your signed application form.

Full Name

Permanent Residential Address

Postcode

I apply to transfer my existing Cash ISA

from (current provider)  to (new provider) **Yorkshire Building Society**

Yorkshire Building Society Cash ISA number

I authorise Yorkshire Building Society:

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
- to make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA terms and conditions.

I declare that this application form has been completed to the best of my knowledge and belief.

Signature:  Date:

Return this section to your current ISA provider together with any passbook or certificate.

YOUR CURRENT CASH ISA PROVIDER NAME AND ADDRESS	YOUR TITLE, NAME AND ADDRESS
.....	.....
.....	.....
.....	.....
Postcode	Postcode

Current Provider's Name  Yorkshire Building Society Account Number

Current Provider's ISA Account Number  Date of Birth

National Insurance Number

**Transfer Instructions** - please select one of the following two options:

(a) To close your account and transfer all funds and accrued interest to Yorkshire Building Society, please tick this box:

(b) To transfer part of your funds to Yorkshire Building Society, please enter the amount to transfer and whether this includes subscriptions made in the current tax year below.

*Please note that HM Revenue & Customs rules require that only whole transfers of current year subscriptions can be made.*

Amount to Transfer £  Current tax year subscriptions included? Yes  No

Serve the full notice period before this instruction can be processed  Proceed immediately with the transfer and bearing any consequential loss of interest which may be applied

Signature:  Date:

**To the current provider:**  
Yorkshire Building Society is willing to accept the transfer of Cash ISA funds only and asks you to send the transfer history and your cheque (we only accept transfers by cheque), **quoting the above Yorkshire Building Society account number**, to:  
ISA Transfer Team, Savings Service, Yorkshire Building Society, Yorkshire House, Yorkshire Drive, Bradford, BD5 8LJ.

**Please read the instructions on 'What to do now' on page 2 of this form**

### **What to do now**

- (a) If you don't have an ISA with the Yorkshire Building Society:
- Please complete a Cash ISA application form, ticking the Transfer In box and return to your local Yorkshire Building Society Branch.
  - Complete this Transfer Instruction form (leave the Yorkshire Building Society account number blank) and send the bottom section to your current provider, together with any passbook or certificate for the ISA you have with them and the top section to your local Branch with the Cash ISA application form.
- (b) If you want to transfer Cash ISA savings held with another provider to an existing Yorkshire Building Society Cash ISA, please write your account number on this form and send the bottom section to your current provider, together with any passbook or certificate for the ISA you have with them and the top section to Savings Service, Yorkshire Building Society, Yorkshire House, Bradford, BD5 8LJ.

### **What happens next**

- Your current provider has 30 days from receipt of your transfer in which to send your funds to us.
- On receipt we will apply the funds to your Yorkshire Building Society account and write to you to confirm the transfer is complete.