

Full Name

Permanent Residential Address   
  
 Postcode

Date of Birth

Do you have a National Insurance (NI) Number? Yes  No  If Yes, you must enter it here   
You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the Department for Work and Pensions (DWP), or pension order book.

**Instructions:**

I apply to transfer my existing ISA - Account Number

Product

Please forward your ISA passbook/certificate.

I give you notice to transfer on (date)  With loss of interest  Without loss of interest

- To transfer your ISA to another existing ISA complete Section A - Transfer Instructions  
 or  
 To change the product on your existing ISA complete Section B - Product Change Instruction.

**Section A - Transfer Instructions:**

(a) To transfer the whole balance of your account tick here   
 or

(b) Enter the amount you would like to transfer £

Does this amount include subscriptions made in the current year? Yes  No

**Note:**  
 It is important to note that under HM Revenue & Customs rules, only whole transfers of current tax year subscriptions can be carried out.

I want to transfer funds to an existing account number

and subscribe to this cash ISA for the tax year 2010/2011 and each subsequent year until further notice (delete if you will not be subscribing to this ISA after the transfer).

Please forward the existing passbook/certificate.

**Section B - Product Change Instruction:**

Please change my existing cash ISA to:

Product

**I declare that:**

- all subscriptions made, and to be made, belong to me;
- I am 16 years of age or over;
- I have not subscribed and will not subscribe more than the overall subscription limit in total to a cash ISA and a stocks and shares ISA in the same tax year;
- I have not subscribed and will not subscribe more than the cash ISA subscription limit to one cash ISA;
- I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash ISA; and
- I am resident and ordinarily resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Yorkshire Building Society if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

*Delete these declarations if you will not be subscribing to this ISA after the transfer.*

**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.**

For Internal Use Only	
Signature Checked	<input type="text"/> (Initials)
Branch Code	<input type="text"/>
Staff Number	<input type="text"/>

Signature:  Date: