ISA Transfer Authority

To transfer your ISA to a Lloyds ISA provided by Bank of Scotland plc

LLOYDS

1 Your details

Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify)

Date of birth (DD MM YYYY)

Full name

National Insurance number

Address

Postcode

Lloyds Cash ISA sort code

Lloyds Cash ISA account number

2 Details of the existing ISA you want to transfer

Name of your existing ISA provider

Existing ISA sort code

Existing ISA account number

AND / OR

Roll number/Reference (if your existing ISA provider is a building society or you are transferring a stocks and shares ISA)

1. Which **one** of these describes your ISA transfer instruction

My ISA has:

☐ No restrictions - transfer immediately

☐ A notice period or fixed term - wait until the end of restrictions and then transfer

☐ A notice period or fixed term - transfer immediately (your existing provider may charge you for this)

2. Do you want to transfer everything from your existing ISA and then close it?

Yes ☐ **If Yes,** Move to next section, below

No ☐ **If No,** Go to question 3

3. How much of your existing ISA do you want to transfer to Lloyds?

Specify amount

£

4. Mark this box to include any contributions made this tax year as part of the transfer amount specified above

☐ Include all of any current year contributions

3 Your declaration and authorisation

I authorise my existing ISA provider (as named above) to transfer the ISA (account number above) to a Lloyds ISA provided by Bank of Scotland.

I authorise my existing ISA provider to give Lloyds with Bank of Scotland as the ISA Manager any information they need about this ISA, and to accept any instructions from Lloyds with Bank of Scotland as the ISA Manager about the transfer of this ISA.

Your signature

Date (DD MM YYYY)

4 Send the completed form

Send the completed form to: **Bank of Scotland, The Green Building, Kirkstall Road, Leeds, LS78 1LB.**

For bank use only

We confirm that we accept the transfer of this ISA account – in line with the authority given by our mutual customer above.

- **Please arrange for the money to be sent directly to the customer's Lloyds ISA provided by Bank of Scotland by electronic payment**, or by cheque payable to Bank of Scotland re (customer's name) and posted to Bank of Scotland Plc, ISA Transfer Team, 11 Portland Street, Manchester, M1 3HU.
- **Please send the transfer history form to our email address detailed on the TISA database**, or post to Bank of Scotland, ISA Transfer Team, 11 Portland Street, Manchester, M1 3HU.

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