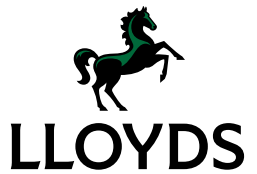


# ISA Transfer Authority

## To transfer your ISA to Lloyds Bank plc



## 1 Your details

Title

Mr

Mrs

Miss

Ms

Other (please specify)

Date of birth (DD MM YYYY)

Full name

National Insurance number

Lloyds Cash ISA sort code

Lloyds Cash ISA account number

Address

Postcode

## 2 Details of the existing ISA you want to transfer

[illegible]

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 Lloyds.

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

**Your signature**

Date (DD MM YYYY)									

#### 4 Send the completed form

Send the completed form to: **Lloyds Bank, 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 by electronic payment**, or by cheque payable to Lloyds Bank plc (customer's name) and posted to Lloyds Bank 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 Lloyds, ISA Transfer Team, 11 Portland Street, Manchester, M1 3HU.

