ISA Transfer Authority





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) AND / OR 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 - wait until the end of restrictions and then transfer manufaction 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 If No, Go to question 3 5 Your declaration and authorisation Lauthorise my existing ISA provider (as named above) to transfer the ISA (account number above) to Lloyds. Lauthorise my existing ISA provider (as named above) to transfer the ISA (account number above) to Lloyds. Lauthorise 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. Send the completed form Send the completed form Send the completed form co: Lloyds Bank, The Green Building, Kirkstall Road, Leeds, LS78 1LB.	Title Mr Mrs Miss Ms Other (please specify) Full name Address	Date of birth (DD MM YYYY) National Insurance number Lloyds Cash ISA sort code Lloyds Cash ISA account number
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 transfering a stocks and shares ISA) AND/OR AND/OR Roll number/Reference (if your existing ISA provider is a building society or you are transfering a stocks and shares ISA) AND/OR AND/O	Postcode	
Existing ISA sort code Existing ISA account number AND / OR Society or you are transferring a stocks and shares ISA) AND / OR No restrictions 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) Do you want to transfer everything from your existing ISA and then close it? Yes If Yes, Move to next section, below If No, Go to question 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. Section, below Your signature Your signature Your signature AND / OR Specify amount E 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 Include all of any current year contributions Your signature Your signature Date (DD MM YYYY) Date (DD MM YYYY)		
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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) Do you want to transfer everything from your existing ISA and then close it? Yes If Yes, Move to next section, below If No, Go to question 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 Your signature Date (DD MM YYYY) Date (DD MM YYYY)	1. Which one of these describes your ISA transfer instruction	3. How much of your existing ISA do you want to transfer to Lloyds?
2. Do you want to transfer everything from your existing ISA and then close it? Yes If Yes, Move to next section, below If No, Go to question 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. Date (DD MM YYYY) 4 Send the completed form	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	 Mark this box to include any contributions made this tax year as part of the transfer amount specified above
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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 re (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.

