

Use this form to transfer your existing ISA funds to a Shawbrook Bank ISA. It may take up to 15 working days for the transfer to complete.

Please fill out, sign and return this form to us by email or post.

Email: isa@shawbrook.co.uk

Post: Lutea House, Warley Hill Business Park, The Drive, Great Warley, Brentwood, Essex, CM13 3BE

Shawbrook ISA account number:	
1. Your personal details	
Full name:	
Current address:	
Date of birth:	
Contact phone number:	
National insurance number:	
2. Details of the ISA you want to transfer to Shawbrook Bank	
Existing ISA provider:	
Existing ISA provider address:	
Account number of existing ISA:	
Sort code of existing ISA:	
Investment type:	

Only complete the table below if your existing ISA is a Stocks and shares ISA.

Please use the box below to give instructions to your current stocks and shares ISA provider with regards to what specific value or Tax Year(s) should be transferred and/or what investments should be realised to complete the transfer.

If needed, please list all investments that you hold with the above ISA provider that you wish to sell and transfer the proceeds to your new Cash ISA with Shawbrook Bank. Alternatively, you may provide this information by supplying a separate list, e.g. by annotating the valuation statement from your provider.

Description of investment	Investment indicator e.g. ISIN, sedol, cuip etc. (if known)	Number or value of stocks, shares, units or specify "All" to sell the entire holding

3. Your transfer request

Please choose one of the following options:

Please transfer the entire amount

Please transfer £ from subscriptions made into the ISA in previous tax years

Please transfer my current year's subscription funds only

4. Other information

If your existing ISA is a bond, when is/was the maturity date?

If your existing ISA is a notice account, do you have to give notice? Yes No

If yes, how many days?

5. Declaration and transfer authority

I apply to transfer my existing ISA, as detailed above, to a new Shawbrook Bank ISA.

I authorise my existing ISA manager to transfer my ISA to Shawbrook Bank.

I authorise my existing ISA manager to provide Shawbrook Bank any information 'written or non-written' about my ISA and to accept any instructions from Shawbrook Bank relating to the ISA being transferred.

A period of notice is required for closure/part transfer of the existing ISA.

I give my consent to serve the full notice period before this instruction can be processed: Yes No

Customer Signature:

Date:

Transfer Acceptance

In circumstances where the funds to be transferred are not cash deposits, please notify us as we may not be able to accept the transfer. Otherwise we (Shawbrook Bank) are willing to accept this investor's ISA funds, subject to HMRC rules (the ISA regulations). We deem the date shown below to be the transfer date of this ISA.

Date:	
Name:	Shawbrook Bank: ISA Transfer Team
Telephone:	0345 266 6611
Address:	Lutea House, Warley Hill Business Park, The Drive, Great Warley, Brentwood, Essex, CM13 3BE
Email:	isa@shawbrook.co.uk