



ISA TRANSFER AUTHORITY FORM

HOW TO COMPLETE THIS FORM

In order transfer an ISA to LandlordInvest, you will need to complete this Transfer Authority form that gives us the authority to transfer funds from your ISA manager.

We recommend that you should read our IFISA Terms and Conditions before you sign this form. You should also read our Risk Warnings. If you do not understand any point please ask for further information.

Our IFISA Terms and Conditions are available here: www.landlordinvest.com/terms and our Risk Warnings are available here: www.landlordinvest.com/risk-warning

Once complete, please return form by e-mail to: ifisa@landlordinvest.com

1. YOUR DETAILS

Title

First Name

Last Name

Date of Birth

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National Insurance Number

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Address

Postcode

Telephone Number

Email Address

2. INFORMATION ABOUT THE ISA YOU WANT TO TRANSFER

Name of existing ISA manager

Account number of existing ISA

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Address of existing ISA manager

Postcode

PLEASE NOTE

The terms and conditions of some ISA products do not allow only part of an ISA to be transferred. Your existing manager may need you to give them specific information before the cash transfer can go ahead. Please check with your ISA manager if you are not sure about this.

CASH ISA TRANSFER

1. Have you subscribed to this ISA in the current tax year? Yes No

2. If yes, please confirm the amount you have subscribed in the current tax year:

Please select one of the following options to confirm how much you wish to transfer:

1. If you wish to transfer the whole balance (including accrued interest tick here:

2. If you wish to transfer part of the balance, please confirm the amount:

3. If you only wish to transfer current year subscriptions (in full) plus interest, tick here:

STOCKS & SHARES ISA TRANSFER

1. Have you subscribed to this ISA in the current tax year? Yes No

2. If yes, please confirm the amount you have subscribed in the current tax year:

Please select one of the following options to confirm how much you wish to transfer:

1. If you wish to transfer the whole balance (including accrued interest tick here:

2. If you wish to transfer part of the balance, please confirm the amount:

3. If you only wish to transfer current year subscriptions (in full) plus interest, tick here:

INNOVATIVE FINANCE ISA TRANSFER

1. Have you subscribed to this ISA in the current tax year? Yes No

2. If yes, please confirm the amount you have subscribed in the current tax year:

Please select one of the following options to confirm how much you wish to transfer:

1. If you wish to transfer the whole balance (including accrued interest tick here:

2. If you wish to transfer part of the balance, please confirm the amount:

3. If you only wish to transfer current year subscriptions (in full) plus interest, tick here:

Please note that the amount in your account representing current tax year subscriptions can only be transferred in whole and not in part

3. TRANSFER AUTHORITY

I authorise my existing ISA manager (as set out above) to transfer the ISA (account number above) to LandlordInvest.

I authorise my existing ISA manager to provide LandlordInvest with any information, written or non-written, concerning the ISA and to accept any instructions from them relating to the ISA being transferred,

Where a period of notice is required for closure/part transfer of the existing ISA, I give my consent to either: (ISA investor to tick as appropriate)

1. Serve the full notice period before this instruction can be processed.
OR
 2. Proceed immediately with the transfer and bearing any consequential penalty which may be applied.

Name

Signature

Date

FOR INTERNAL USE - TO BE FILLED OUT BY LANDLORDINVEST

We are willing to accept this ISA transfer in line with the customer's instructions above, as long as the value is transferred as cash.

I deem the date shown to be the transfer date of this ISA

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Name: LandlordInvest Limited

Telephone: 020 7406 1491

Address: LandlordInvest,
5 Chancery Lane
London,
WC2A 1LG