

ISA Transfer Letter Of Authority

Please complete one **Transfer Letter of Authority** for each provider/plan manager you wish to transfer from and return to us with your completed **ISA Application**. Please print or photocopy additional copies of this form if required. **If possible, a list of the investments you are transferring should also be submitted. For example, a copy of your last valuation statement.**

If you wish to make a partial transfer of your existing account, you should complete an **ISA Partial Transfer Letter of Authority**.

Need help in completing this form? Call us on **020 7189 2400**.

Please complete all sections of this form in **BLOCK CAPITALS**

1. Your details

Title (Mr/Mrs/Miss/Ms/Other)

Surname

First Names (in full)

Permanent Residential Address

Postcode

Date of Birth

National Insurance Number (or equivalent Tax Identification Number)

2. Details of investments being transferred

ISA Provider's/Plan Manager's Name

ISA Provider's/Plan Manager's Address

Postcode

Existing ISA Account No./Reference

Sort Code (cash ISAs only)

Approximate Transfer Value

3. Valuation of investment

Please provide a copy of your current valuation, including book costs, SEDOL or ISIN details to speed up the transfer

4. Please take this authority to transfer my entire (Please tick one choice only)

Stocks & shares ISA (choose your transfer method below):

I would like to transfer my stocks & shares ISA to the Bestinvest ISA as:

Stock/funds (as opposed to in cash) All holdings in your existing account will be transferred along with any cash
or

Cash All holdings will be sold and the cash proceeds transferred along with any other cash

If this transfer includes your ISA subscriptions for the current tax year, please tick here

Cash ISA

If this transfer includes your ISA subscriptions for the current tax year, please tick here

5. Declaration & signature

By signing below, I authorise the ISA Manager named above to:

- Provide Evelyn Partners Investment Management Services Limited and their appointed custodian, SEI Investments (Europe) Ltd, with any information they may require in respect of the ISA being transferred
- Either transfer my holdings to Bestinvest's appointed custodian, SEI Investments (Europe) Ltd, or liquidate the assets within my ISA with immediate effect, and forward the proceeds to Bestinvest's appointed custodian
- Stop collecting my regular savings with immediate effect if I have chosen to transfer my current tax year ISA

By signing below I agree to the above declaration

Name

Date

Once completed, please submit by either:

- **Signing this form digitally** using Adobe sign.
- **Printing out and posting** to Online Investment Service, Bestinvest, Royal Liver Building, Pier Head, Liverpool L3 1NY.
- **Scanning the form and emailing** to best@bestinvest.co.uk