

# 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. 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

☐

### 4. 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

X

PLEASE SIGN HERE

X

Date

D D M M Y Y Y Y

Once completed, please return this form to: **Online Investment Service, Bestinvest, Royal Liver Building, Pier Head, Liverpool L3 1NY**