Cash ISA Transfer Authority

To transfer your Cash ISA to Lloyds TSB Bank plc

Lloyds TSB

Complete in full Sections 1, 2 and 3 of this form in ink and write clearly in the white spaces with CAPITAL LETTERS, or cross the boxes.

Send the completed and signed form to:
Lloyds TSB Bank Plc, ISA Transfer Unit, BX1 1LT.

1 Your details

Your title Mr ☒ Mrs ☒ Miss ☒ Ms ☒ Other (please specify)

Your last name

Your first name

Your residential address

Post code

Your date of birth D D M M Y Y Y Y

Your home telephone number including area dialling code

Your National Insurance number

Your Mobile number

Lloyds TSB Cash ISA branch sort code

Lloyds TSB Cash ISA account number

2 Details of your existing Cash ISA you wish to transfer

Name of your existing ISA provider

Address of your existing ISA provider

Post code

Existing ISA branch sort code

Existing ISA account number

and/or

Roll number (if your existing ISA provider is a Building Society)

Have you paid into this Cash ISA in this current tax year? Yes ☒ No ☒

If yes please enter the amount paid in £ – .

If your existing Cash ISA is subject to a notice period with your current provider they will not complete the transfer until this has expired, unless you indicate otherwise by crossing the box below in Section 3.

We will assume you wish to close your existing Cash ISA and transfer the whole amount to Lloyds TSB. Only complete the following if it is your intention to transfer part of your existing Cash ISA.

Amount you wish to transfer £ – .

Do you want to transfer any current tax year deposits made as part of this amount? Yes ☒ No ☒

3 Your declaration and authorisation

Please transfer my Cash ISA immediately to Lloyds TSB for which I accept responsibility for any charges or interest penalties that I may incur in respect of waiving the required notice period. ☒

I authorise my existing ISA provider (as specified above) to transfer the ISA to Lloyds TSB.

I authorise my existing ISA provider to supply Lloyds TSB with any information, written or non-written, concerning the Cash ISA and to accept any instructions from them relating to the Cash ISA being transferred.

Failure to sign this authority will result in a delay in the completion of your transfer.

Your signature

Date

For Lloyds TSB use only

We confirm that we are willing to accept the transfer of this Cash ISA account, in accordance with the authority of our mutual customer which is given above.

Please arrange for the funds to be made payable to Lloyds TSB Bank plc re (Customers name) and send to: **Lloyds TSB Bank plc, ISA Transfer Unit, BX1 1LT** together with the transfer document providing the relevant information as detailed in the HM Revenue and Customs Guidance notes.

Date D D M M Y Y

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Lloyds TSB Scotland plc Registered Office: Henry Duncan House, 120 George Street, Edinburgh EH2 4LH. Registered in Scotland, no. 95237.
Authorised and regulated by the Financial Services Authority and signatories to the Banking Codes.