

ISA Transfer Form



This form is designed to allow you to transfer an ISA held with another provider to your SVS ISA account.

Please complete the transfer form and return it to us at Settlements Department, SVS Securities PLC, 20 Ropemaker Street, London, EC2Y 9AR. Once we receive the form we will contact your existing stockbroker to commence the transfer and you will be subject to our Terms of Business.

Section 1: Your details

Title	<input type="text"/>	Address	<input type="text"/>
First name(s)	<input type="text"/>		<input type="text"/>
Last name	<input type="text"/>		<input type="text"/>
SVS XO ISA account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Postcode	<input type="text"/>

Section 2: Existing ISA details

Name of ISA Provider	<input type="text"/>	Address	<input type="text"/>
Name of ISA manager (if known)	<input type="text"/>		<input type="text"/>
Account number	<input type="text"/>	Postcode	<input type="text"/>
		Telephone	<input type="text"/>

Section 3: Type of transfer

Please tick one box:

- Entire ISA
- Current year only
- Previous year's ISA subscriptions in whole or in part

Please tick one box:

- Please transfer all the stock and cash intact
- Please sell the holdings and transfer as cash
- Please transfer a combination of stock and cash as specified separately

If previous year's ISA, how much would you like to transfer?

Section 4: Declaration

By signing below I declare that:

- You may provide any requested information relating to my account to SVS Securities PLC.
- You may act upon any and all instructions from SVS Securities PLC.
- You may deduct any charges for the transfer as specified in your Terms & Conditions

Signature

Date

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