

Abundance ISA Transfer Authority Form

You can transfer an existing Cash, Stocks & Shares or Innovative Finance ISA to your Abundance ISA. Complete the form below and post it to Abundance and we will request your ISA transfer from your existing provider. It is always worth contacting your existing provider to see if they have any exit fees. If you are looking to transfer only part of an existing ISA, you should also check if your existing provider allows partial transfers – some providers only accept a transfer of your full ISA and there may be charges or penalties arising on transfers.

If you are transferring a Stocks and Shares ISA or an Innovative Finance ISA to Abundance, your existing ISA provider will sell all the investments and send us the proceeds in the form of cash so consider and take advice as necessary as to whether this is in your interests.

1. Your Details	
Title:	First name(s):
Date of birth: DD / MM / YYYY	Last name:
National Insurance number:	Telephone Number:
Address:	Email address:
Postcode:	
2. Existing ISA provider's details	
Existing ISA Account Reference(s):	
Existing ISA Account Number and Sort Code: (If applicable)	
ISA provider's name:	Have you subscribed to this ISA in the current tax year? <input type="checkbox"/> Yes <input type="checkbox"/> No
ISA provider's address:	Please select the type of ISA: <input type="checkbox"/> Cash ISA <input type="checkbox"/> Stocks & Shares ISA <input type="checkbox"/> Innovative Finance ISA
Postcode:	

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

- 1. If you wish to transfer the **whole** value of your ISA (including accrued interest) tick here
- 2. If you wish to transfer **part** of your ISA, please confirm the amount (and check with your existing ISA manager that they will allow partial transfers)

If this is a partial transfer, how much would you like to transfer?

- 3. If you only wish to transfer **current year** subscriptions (in full) plus interest, tick here (Only whole transfers of current tax year subscriptions and interest can be accepted)

3. Transfer Authority

The declaration and information I have given in my Abundance ISA application is correct to the best of my knowledge and I have read and agreed the Abundance Terms & Conditions and the Abundance ISA Terms & Conditions. This is the basis of my contract with Abundance and I will notify Abundance of any changes to these details. I understand that my existing ISA Manager may charge me to transfer, and that there may be a period of time when I am not invested.

I authorise my existing ISA provider:

- (a) to transfer my ISA to Abundance
- (b) to sell my ISA investments, where relevant, and send the proceeds to Abundance;
- (c) to discuss with Abundance any details relating to my existing ISA in order to ensure the completion of the transfer, thereby meeting the requirements under the Data Protection Act 1998.

Please note, where your Cash ISA contains a fixed-term deposit you may face penalties if you transfer your ISA before the maturity date. Therefore please confirm when you would like the transfer to happen:

- I would like the transfer to be completed **as soon as possible**
- I would like the transfer to be completed **at the maturity date**

Signature

Date

Please return the completed form to:

Abundance Investment
Unit 16 Linen House, 253 Kilburn Lane, London, W10 4BQ

Name: Abundance Investment
Telephone: 0203 475 8666
Email: support@abundanceinvestment.com
Address: Unit 16 Linen House, 253 Kilburn Lane, London, W10 4BQ

Abundance a limited company registered in England and Wales (no. 07049166)
Abundance is authorised and regulated by the Financial Conduct Authority (no. 525432)
Abundance is an approved ISA Manager by HM Revenue and Customs (no. Z1870)