YORKSHIRE BUILDING SOCIETY

INTERNAL ISA TRANSFER INSTRUCTION/ APPLICATION FORM

Please complete this form if you wish to transfer (merge) existing Yorkshire Building Society or Chelsea Building Society cash ISA to a Yorkshire Building Society ISA

Your Details

Full Name

Permanent Residential Address

Postcode

Date of Birth

Do you have a National Insurance (NI) Number? Yes ☐ No ☐ If Yes, you must enter it here

You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the DWP or a pension order book.

Your Instructions:

I authorise Yorkshire Building Society/Chelsea Building Society to transfer my existing cash ISA account number

to my existing Yorkshire Building Society cash ISA in accordance with my instructions below (please tick box A or B below)

A ☐ Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer

or

B ☐ depending on the terms and conditions, carry out the transfer as soon as possible - I will accept any consequential loss of interest or charges that may be applied.

Please complete **EITHER** section 1 or 2 below

Section 1. Full Transfer	**Section 2. Part Transfer**
Please close and transfer ALL of my ISA as instructed above ☐	Please transfer £ Does this amount include subscriptions made in the current tax year? Yes ☐ No ☐ NOTE: Subscriptions from current tax year must be transferred in full.

Where you are requesting funds to be transferred into a Help to Buy: ISA the amount being transferred must be within the Help to Buy: ISA limits.
Please forward your ISA passbook/certificate together with these instructions.

SMALL CHANGE BIG DIFFERENCE SCHEME: Yorkshire Building Society Charitable Foundation's aim is to help alleviate poverty, improve health and save lives. The Small Change Big Difference® (SCBD) scheme allows our members to donate the annual pence of interest from their savings or mortgage accounts to the Charitable Foundation. The average donation is less than 50p per year and the maximum is just 99p. Every penny donated through the SCBD scheme goes directly to help local charities recommended by members and colleagues.
To donate the pence from your interest to the Charitable Foundation, simply put an X in this box ☐
(**Small Change Big Difference** is a registered trademark of Yorkshire Building Society. Yorkshire Building Society Charitable Foundation Registered Charity No: 1069082. Registered Office: Yorkshire Drive, Bradford BD5 8LJ.)

I authorise Yorkshire Building Society:

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
- to make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the terms and conditions of the account (including the ISA terms and conditions) which have already been provided. I will also be subject to the Rules of the Society (a copy of which can be obtained on request).
I declare that this application form has been completed to the best of my knowledge and belief.

Signature: Date:

Our printed material is available in alternative formats e.g. large print, Braille or audio. Please visit us in branch or call us on **0345 1200 100.**
Yorkshire Building Society is a member of the Building Societies Association and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Yorkshire Building Society is entered in the Financial Services Register and its registration number is 106085. Head Office: Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ. All communications with us may be monitored/recorded to improve the quality of our service and for your protection and security. Calls to 03 numbers are charged at the same standard network rate as 01 or 02 landline numbers, even when calling from a mobile.