



ISA Transfer Authority

This form can be used to transfer your ISA across to Novia. Once completed, please return this form and any additional enclosures to Novia Client Services, PO Box 4328, BATH, BA1 0LR. PLEASE COMPLETE THIS FORM IN CAPITALS USING BLACK INK.

1 Investor Details

<input type="checkbox"/> Mr	<input type="checkbox"/> Miss	<input type="checkbox"/> Mrs	<input type="checkbox"/> Other	Novia Wrapper Number	<input type="text"/>
Surname	<input type="text"/>			Date of birth	<input type="text" value="DD/MM/YY"/>
Forename(s)	<input type="text"/>			National Insurance Number	<input type="text"/>
Failure to provide your correct National Insurance Number can make your ISA invalid and so you will lose the tax benefits.					
House number/name	<input type="text"/>	Street name	<input type="text"/>		
Town/City	<input type="text"/>	County	<input type="text"/>		
Country	<input type="text"/>	Postcode	<input type="text"/>		

Notes

Please use this space to provide any additional notes or information; please do not use a separate cover letter for key information.

2 Details of your existing Plan Manager

Plan to be transferred – Account number	<input type="text"/>				
ISA Manager name	<input type="text"/>				
Building number/name	<input type="text"/>	Street name	<input type="text"/>		
Town/City	<input type="text"/>	County	<input type="text"/>		
Country	<input type="text"/>	Postcode	<input type="text"/>		

3 Details of Transfer

This transfer is from a	<input type="checkbox"/> Cash ISA	or	<input type="checkbox"/> Stocks and Shares ISA		
<input type="checkbox"/> Partial transfer of	£ <input type="text"/>	or	Full transfer of an estimated	£ <input type="text"/>	
Amount contributed so far in this tax year	£ <input type="text"/>				

4 Declaration

I authorise you to transfer my investments in cash when requested by Novia and provide them with any related information.

Print Name	<input type="text"/>				
Signature	<input type="text"/>				
Date	<input type="text" value="DD/MM/YY"/>	ISA Transfer Inland Revenue Number	<input type="text" value="Z 1 6 9 2"/>		