

ISA Transfer Authority Form



Please complete this form if you would like to transfer your existing ISA to LendingCrowd.
If you wish to transfer ISAs from different providers, you must complete an authority form for each transfer request.

Please note that the minimum transfer in that we will accept is £1,000. Terms apply, see website for details.

Please return the completed form to: **ISA Department, LendingCrowd, 23 Manor Place, Edinburgh, UK EH3 7DX**

If you have opened a Self Select ISA and a Growth or Income ISA, the funds transferred will be added to your Self Select ISA and you can then move them to your Growth or Income ISA if you wish.

If you have any questions about completing this form, please email investor@lendingcrowd.com or call 0345 564 1600

SECTION 1 – Personal Details			
Title	<input type="text"/>	Surname	<input type="text"/>
Forename(s)	<input type="text"/>		
Date of birth	<input type="text"/>	National Insurance no.	<input type="text"/>
Permanent residential address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
		Postcode	<input type="text"/>
Contact telephone number	<input type="text"/>		
Email address	<input type="text"/>		

SECTION 2 – Information about the ISA you want to transfer to LendingCrowd			
Name of existing ISA manager	<input type="text"/>		
Address of existing ISA manager	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
		Postcode	<input type="text"/>

Section 2a – To transfer a Cash ISA to LendingCrowd, complete this section			
Sort Code	<input type="text"/>	Account number	<input type="text"/>
Roll number (if applicable)	<input type="text"/>		
Did you subscribe to your existing Cash ISA in the current tax year?	<input type="checkbox"/>	Yes	<input type="checkbox"/>
	<input type="checkbox"/>	No	<input type="checkbox"/>
If yes, what amount did you subscribe this year?	<input type="text"/>		
Please select one of the following to confirm the amount you want to transfer:			
1. To transfer the entire balance tick here	<input type="checkbox"/>		
2. To transfer part of the balance, confirm the amount	<input type="text"/>		
3. To transfer only current year subscriptions (in full) tick here	<input type="checkbox"/>		

Section 2b – To transfer a *Stocks & Shares ISA, Innovative Finance ISA or Lifetime ISA* to LendingCrowd, complete this section

Account number	<input type="text"/>				
Roll number (if applicable)	<input type="text"/>				
Did you subscribe to your existing Stocks & Shares ISA or Innovative Finance ISA or Lifetime ISA in the current tax year?	<table border="1"><tr><td>Yes</td><td><input type="checkbox"/></td><td>No</td><td><input type="checkbox"/></td></tr></table>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>		
If yes, what amount did you subscribe this year?	<input type="text"/>				
Please select one of the following to confirm the amount you want to transfer:					
1. To transfer the entire balance tick here	<input type="checkbox"/>				
2. To transfer part of the balance, confirm the amount	<input type="text"/>				
3. To transfer only current year subscriptions (in full) tick here	<input type="checkbox"/>				

SECTION 3 – Transfer authority

I authorise my existing ISA provider to transfer the ISA with the above account number to LendingCrowd. I authorise my existing ISA provider to provide LendingCrowd with any information about my ISA and to accept any instructions from them relating to the ISA being transferred. For a Stocks & Shares ISA I authorise my existing ISA manager to liquidate my ISA investments and pay the proceeds to LendingCrowd.

Some ISA providers may require you to give notice before you can transfer funds or close your account. Please check with your existing provider and select the appropriate box below:

1. No notice required for transfer or closure

Where I must give notice, I instruct my existing ISA provider to either:

2. Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before processing the transfer

Or

3. Carry out the transfer as soon as possible – I will accept any consequential loss of interest or charges incurred

Signed	<input type="text"/>
Date	<input type="text"/>

SECTION 4 - Office Use Only

ISA Transfer Case No.	<input type="text"/>
Date	<input type="text"/>