

- To open a new Kent Reliance ISA and to transfer ISA funds from another provider into the new ISA, please complete the relevant ISA application form as well as this form (this request must occur within 30 days of your account being opened).  
**Note:** If you wish to transfer more than one ISA you will need to complete a transfer form for each ISA you wish to transfer.
- To transfer ISA funds from another provider into your existing Kent Reliance ISA, simply complete one copy of this form for each ISA you wish to transfer.
- To switch funds from one type of Kent Reliance ISA to a new type of Kent Reliance ISA (without transferring funds from another ISA provider) simply complete the relevant ISA application form.

### 1 PERSONAL INFORMATION

Title (✓) Mr  Mrs  Miss  Ms  Other

Full name

Address   
  
 Postcode

Daytime telephone no.  Email

Date of birth  /  /  National Insurance number

### 2 ACCOUNT PROVIDER (DO NOT WRITE KENT RELIANCE HERE)

Please accept the transfer to Kent Reliance of the ISA which I currently hold with:

Name of current ISA provider

Address   
  
 Postcode

### 3 ACCOUNT DETAILS AND TRANSFER INSTRUCTIONS

Account details for **existing** ISA with current provider (these details must be provided):

Please tick one box only

**Transfer of cash ISA** (allow up to 15 working days for the transfer to be completed)

**Transfer of stocks and shares ISA** (allow up to 30 days for the transfer to be completed)

Account no.

Sort code: (if applicable)  -  -

**This is my formal instruction to transfer my ISA to Kent Reliance.**

**Please note:** The terms and conditions of some ISA products do not allow a partial transfer. Your existing provider may need you to supply specific information before the transfer can go ahead – please check with them in the first instance if you are not sure.

For the current tax year you can only transfer the full ISA subscription.

Please complete the following as applicable:

<input type="checkbox"/>	Transfer the whole balance - estimated balance	<input type="text"/>
<input type="checkbox"/>	Tick if the whole balance transfer includes current tax year's ISA subscriptions	
<input type="checkbox"/>	Transfer the total of this tax year's ISA subscriptions - estimated balance	<input type="text"/>
<input type="checkbox"/>	Transfer the total of previous tax years' ISA subscriptions - estimated balance	<input type="text"/>
<input type="checkbox"/>	Make a partial transfer of previous tax years' ISA subscriptions - estimated balance	<input type="text"/>
	<b>Total</b>	<input type="text"/>

**Don't forget to sign and date overleaf**

**4 TRANSFER DATE**

Tick only one option

- Transfer as soon as possible (accepting any interest penalty or fee which may apply)
- Transfer on or after   /   /
- Transfer after expiry of the   day notice period

**Note:** We will only hold your request open for 30 days. If you have a notice account with your current provider, please check your notice period before submitting your request.

**5 TRANSFER OPTIONS**

I would like the funds to be transferred to a (please tick one box):

**Note:** If you are not transferring into an existing Kent Reliance ISA you will also need to complete the application form for the ISA product you have selected.

- I would like to transfer to a new Kent Reliance ISA - application form enclosed.

Existing ISA members:

- I would like the funds transferred to my existing ISA.

Account number

**6 CONSENT AND DECLARATION**

1. I authorise my existing ISA provider to transfer the ISA named overleaf to Kent Reliance.
2. I authorise my existing ISA provider to supply Kent Reliance with any information about the ISA and accept any instructions from them relating to the ISA being transferred.

SIGNED \_\_\_\_\_ DATED   /   /

**7 KENT RELIANCE TRANSFER ACCEPTANCE – NOTES TO CURRENT PROVIDER**

We are willing to accept this ISA transfer in line with the customer’s instructions, as long as the following conditions are met:

- We receive the transfer proceeds no later than 5 days from the date stamp (this is the transfer date) unless otherwise specified in section 4.
- Where the customer has indicated that they want to transfer ISA subscriptions for the current tax year this must not exceed the HMRC tax year ISA limit.

Send this form to: **Kent Reliance  
PO Box 601  
Chatham  
ME4 9DX**

**Include the relevant application form unless you are transferring into an existing Kent Reliance ISA.**

**If you have an existing Kent Reliance fixed term cash ISA which is due to mature please include your maturity instructions.**

