

This form can be completed electronically then saved and printed. If completing manually, please complete in black ink and BLOCK CAPITALS. If you need any help completing this form, please call us on 01257 235003 or visit your local branch.

For current and/or previous tax years' subscriptions

Complete this form to authorise the transfer of current and/or previous tax years' subscriptions in your Chorley Cash ISA, to another Chorley ISA, and return the form to us. Completing this form ensures you maintain the tax-free status on your ISA transfer. The form can be returned to us by secure message, email, post or to your local branch.

1. Personal Details

Title First Name(s) Surname

Address

Date of birth

Do you have a National Insurance Number? Yes No
If yes, this must be entered below.

National Insurance Number

You should be able to find your National Insurance Number on a payslip, P45 or P60, a letter from HM Revenue and Customs, a letter from DWP or pension order book.

Postcode

Contact Number Email

2. Chorley ISA you are transferring from

Account Name Chorley ISA number

3. Chorley ISA you are transferring funds to

Chorley ISA number

4. Your transfer instructions

If you are transferring savings paid into your cash ISA this tax year, you must transfer all money and interest paid into your existing ISA in the current tax year

Do you want to transfer all or part of the money you have paid into your ISA in previous tax years? All Part N/A

Check that the ISA you're transferring to allows previous tax years' subscriptions.

If **part**, select one of the following:

All current year's subscriptions **only**

All current year's plus part of previous £

Previous years' subscriptions **only** or specific amount £

Any restrictions?

If the ISA you're transferring from has any withdrawal restrictions, for example a notice period or fixed term, do you want us to delay the transfer? Please accept this as my authority to undertake the transfer once the notice period / fixed term has expired. Yes

or

Do you want us to carry out the transfer as soon as possible, which may mean that you incur a penalty? Yes

Please refer to the product guide you are transferring the ISA from for details on how this is calculated

5. Declaration and transfer authority

I apply to subscribe to this Cash ISA for the current tax year and each successive year until further notice. I declare that:

- all subscriptions made, and to be made, belong to me;
- I am 18 years of age or over;
- I have not subscribed, and will not subscribe, to more than the overall subscription limit* total in the same tax year;
- I am resident in the United Kingdom (UK) for tax purposes, or, if not resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the UK, or I am married to, or in a civil partnership with, a person who performs such duties;
- I will inform Chorley Building Society if I cease to be so resident or to perform such duties or to be married to, or in a civil partnership with, a person who performs such duties; and
- I agree to the ISA Specific Terms and the Saving Accounts Terms and Conditions that apply to my ISA - please let us know if you would like a copy of these.

I authorise Chorley Building Society:

- to hold my cash subscription, in respect of the interest, dividends and any other rights or proceeds and to claim any relief from tax on my behalf.

I declare that the information given is correct to the best of my knowledge and belief. I confirm the declaration and transfer authority above.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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* For more information on current ISA limits, please contact us by emailing the Savings Team on savers@chorleybs.co.uk, call us on 01257 235003 or visit one of our local branches.

Your Personal Information and what we do with it

We are a data controller of your personal information. The way that we process your personal information is described in our Privacy Notice. The information is available on our website www.chorleybs.co.uk/privacy

For Office use only

For the purposes of the transfer of the ISA wrapper under ISA regulations the date shown will be the transfer date

D	D	M	M	Y	Y	Y	Y
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Head Office address: Key House, Foxhole Road, Chorley, PR7 1NZ | 01257 235003 | chorley@chorleybs.co.uk | www.chorleybs.co.uk

Chorley Building Society is the trading name of The Chorley and District Building Society. The Chorley and District Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority with the Firm Reference Number: 206023.

You can check this on the Financial Services Register at <http://register.fca.org.uk>. Our registered Office is at Key House, Foxhole Road, Chorley, PR7 1NZ.