

Clockwise Credit Union

safe savings & affordable loans

ISA TRANSFER INSTRUCTION FORM

About You

Mr / Mrs / Miss / Ms / Other Surname:

First Name:

Membership No. Address:

Post Code

Do you pay tax within the United Kingdom? Yes No

Details of the cash ISA to be transferred

ISA Provider

Address

Postcode

Phone Number

Existing Account Number Sort Code

1 - If you have paid into your existing (non-Clockwise) cash ISA in the current tax year, do you want this money to be part of the transfer?

Yes No

Deposits made in the current tax year must be transferred in full, under ISA Regulations. A tax year is from 6 April in one year to 5 April in the following year)

2 - Answer **one** of the following:

a) Tick here to transfer all current tax year ISA deposits only
Not available if you have answered 'No' to question 1

b) Tick here to transfer all previous year ISA deposits only
Not available if you have answered 'Yes' to question 1

c) State how much of the total ISA balance you wish to transfer £

Have you subscribed to your existing ISA in the current tax year?

Yes No If yes, please confirm the amount you have subscribed this year

Transfer Authority

I authorise my existing ISA provider to provide Clockwise Credit Union Ltd with any information they require about the cash ISA detailed on this form and to transfer it to them.

I want to transfer (pick **one**)

- Immediately, in which case I accept any consequential loss of interest or penalty (if applicable).
- After serving the full notice period on the account or at maturity on a fixed rate ISA (this option is not recommended if maturity date is more than 30 days from submitting this form).

Signature

Date:

*As a member of Clockwise CU you can currently hold £85,000 with us in total savings.

It's important to note that under HM Revenue & Customs ISA regulations, only whole transfers of current tax year subscriptions and interest can be accepted. The terms and conditions of some ISA products don't allow partial transfers and/or need the account passbook to be return, for info please speak to your current ISA provider

Reminder: In the current tax year, the maximum you can add to your ISAs is £20,000 [this excludes transfers-in from old ISAs]. A new allowance of £20,000 has also been announced for the next financial year

Learn more, see current rates and find Terms & Conditions:
<https://www.clockwise.coop/clockwise-isa>

Privacy Policy:
<https://www.clockwise.coop/privacy-policy/>

Clockwise Credit Union Ltd is authorised by the Prudential Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. We subscribe to the Financial Ombudsman Service and are members of the Financial Services Compensation Scheme.