



# Stocks and Shares ISA Transfer Form

Application to transfer existing Stocks and Shares ISA or Cash ISA to Freetrade Stocks and Shares ISA

During the current climate of COVID-19, many brokers are able to accept electronic versions of transfer application forms. Please fill out the form and sign electronically, or print and sign, then email through a PDF version to [Transferapps@freetrade.io](mailto:Transferapps@freetrade.io) - we will then try our best to process in this way with your current broker.

## Personal Details

Title	
Full Name	
National Insurance Number	
Date of Birth	
Email Address	
Permanent Residential Address	



## Declaration

I hereby declare that:

- I have read and understood the Freetrade Stocks and Shares ISA terms and conditions
- Information that I shall provide in this application is correct to the best of my knowledge and shall be the basis of the contract between me and Freetrade. I will notify Freetrade of any changes to the information provided.
- I accept that Freetrade will not be liable to any losses incurred as a result of any delays in the transfer to the Freetrade ISA
- I accept that Freetrade will not be liable to any costs or fees levied by the existing ISA manager
- (For transfers from Cash ISA's only) I understand that the Cash ISA I am transferring is to be transferred into the Freetrade Stocks and Shares ISA.

## ISA Transfer Authority

Existing Provider Name	
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Existing Account Number / Reference	
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This is a cash <input type="checkbox"/> / stocks and shares <input type="checkbox"/> / Innovative <input type="checkbox"/> ISA
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Sort Code (if applicable)	
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Approximate Transfer Value	
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This is a full <input type="checkbox"/> / partial <input type="checkbox"/> transfer
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## Please take this authority to transfer my ISA as:

(Please select 1)

- Transfer all eligible investments and uninvested cash
- Sell all investments and transfer as cash
- Cash Transfer Only

## To existing plan Manager, I hereby authorise you to:

- Transfer my existing ISA as specified to Freetrade
- Provide any information necessary to Freetrade to facilitate this transfer
- Cancel any direct debits currently in place with immediate effect if I have chosen to transfer the current tax years subscriptions
- Deduct any charges for the transfer as specified within your terms and conditions

I have read and agreed to the declaration above.

Name	
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Date	
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Signature	
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