



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 - 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



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	
Date	
Signature	