



## TRANSFER APPLICATION FORM (TRANSFER TO A STOCKS & SHARES ISA)

This application form is for customers who wish to transfer an ISA from their current ISA provider to a stocks & shares ISA provided by RLUM Limited.

Full name

Address

Postcode

Date of birth

Do you have a National Insurance (NI) number? Yes  No

You can find this on a payslip, a P60 form or by contacting your local tax office.

If yes, please enter it here

Name of current ISA provider

Provider's address

Postcode

Account number

The subscriptions relate to (please tick relevant box)  Current tax year  Previous tax year

Both

Type of ISA to be transferred (please tick relevant box)  Cash  Stocks & Shares

Cash and Stocks & Shares

I wish to transfer (please tick relevant box)  Full amount  Partial amount

£  Amount to be transferred  
(for partial transfers only)\*

\* Please note that if current tax year subscriptions are being transferred, these current tax year subscriptions must be transferred in whole.

I apply to transfer my existing ISA [and subscribe to this stocks & shares ISA for the tax year 20 / and each subsequent year until further notice]. *Delete the words in brackets if you will not be subscribing to this ISA.*

**I authorise RLUM Limited:**

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash *(delete if you will not be subscribing to this ISA)*

or

- to make on my behalf any claims to relief from tax in respect of ISA investments.

**I declare that:** (if you will not be subscribing to this ISA, please delete the following declarations where indicated)

- all subscriptions made, and to be made, to this RLUM Limited ISA belong to me *(delete if you will not be subscribing to this ISA)*
- I am 18 years of age or over
- I am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform RLUM Limited if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties
- I have not subscribed and will not subscribe more than the overall subscription limit in total to a stocks & shares ISA and a cash ISA in the same tax year
- I have not subscribed and will not subscribe to another stocks & shares ISA in the same tax year that I subscribe to this stocks & shares ISA *(delete if you will not be subscribing to this ISA)*
- I have read the latest Key Investor Information for the fund(s) that I am investing in together with the Supplementary Information Document which includes the ISA Terms and Conditions. These documents can be found on our website [myisa.royallondongroup.co.uk](http://myisa.royallondongroup.co.uk), clicking on Apply Now and scrolling down. Alternatively call us on **0345 605 7777** if you'd like us to send you copies
- I am aware that RLUM Limited maintains client money bank accounts with third party UK banks outside of The Royal London Group. I consent to my money being held temporarily as client money in this account whilst my instructions are processed

**I agree to the ISA terms and conditions.**

**I declare that this application form has been completed to the best of my knowledge and belief.**

Signature  Date



Royal London  
Churchgate House, 56 Oxford Street, Manchester M1 6EU  
[royallondon.com](http://royallondon.com)