

Transfer form

Third Platform Services Limited - ISA Plan Manager (Z1888)

1. Personal details

Please complete all sections.

Title

First name(s)

Surname

Address

City

Postcode

County

Country

Contact number

Email address

Date of birth
(DD/MM/YYYY)

National
insurance
number

If you do not have a National Insurance No.
please tick here

For your own benefit and protection you should
read the Terms and Conditions of Third Platform
Services Limited (the "Terms and Conditions") which
will form part of your agreement with us.

2. Declaration

Please ensure you have read and agree to this declaration before you transfer.

I authorise Third Platform Services Limited: (a) To hold my cash subscriptions, ISA investments, interest, dividends and other rights or proceeds in respect of those investments and any other cash (b) To make on my behalf any claims to relief from tax in respect of ISA investments. I have not subscribed, and will not subscribe more than the overall subscription limit in total to a Stocks & Shares ISA, a Cash ISA, Lifetime ISA and an Innovative Finance ISA in the same tax year. I declare that I am 18 years of age or over.

For my own benefit and protection I have been given the opportunity to read the Terms and Conditions carefully and have had any questions I had concerning them answered to my satisfaction.

I agree to the Terms and Conditions.

3. ISA transfer authority

Please complete a separate transfer form for each ISA you wish to transfer.

ISA company's
name

ISA reference to
be transferred

Provider's address

Postcode

Approx transfer value:

Full

Partial

Existing ISA type:

Stocks & Shares ISA

Cash ISA

Innovative
finance

Lifetime

Please transfer my entire ISA to the Third Platform
Services Stocks & Shares ISA as:

Stock

OR

Cash

Subscriptions made in current tax year:

£

I authorise you to transfer my investment(s) as stock
if I have not ticked either the stock or cash option
above.

I authorise you to discuss this transfer with
Third Platform Services by telephone and/or via
correspondence sent to **Third Platform Services
Limited, Birchin Court, 20 Birchin Lane, EC3V 9DU.**

I have read and agreed to the declaration above.

Sign here

Full name

Date (DD/MM/YY)