

External Transfer In ISA form

Your guide to filling in the form

- Additional funds can be added to your new ISA ONLY if you have not yet used your full cash ISA allowance nor paid into a cash ISA with another ISA provider this tax year.
- If you are transferring from a Nationwide ISA this will not be counted again as an ISA subscription.
- Cheques must be made payable to the account holder.

I would like to add to my new ISA by:

<input type="text"/>	and/or	transfer from my/our Nationwide account detailed below subject to the terms and conditions of that account for withdrawals and closure.
Sort code (if there is one)	Account number	£

Please debit my/our account as detailed above

1 Signature of first account holder PLEASE SIGN WITHIN THIS BOX	2 Signature of second account holder PLEASE SIGN WITHIN THIS BOX	Date (please write INSIDE the boxes)
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If two signatures are required to operate this account, please ensure both account holders sign this authorisation. Please ensure the ISA holder also signs below

NB The following wording only applies to those customers who are adding new ISA funds to a new ISA product.

I apply for a cash ISA for the tax year 6th April 20 to 5th April 20 and each subsequent tax year as required

I have read and agree to the declaration.

I declare that:

- Any subscriptions made, and to be made, belong to me;
 - I am 16 years of age or over;
 - I have not subscribed, and will not subscribe, more than the overall subscription limit in total to a cash ISA and a stocks and shares ISA in the same tax year;
 - I have not subscribed, and will not subscribe, to another cash ISA in the same tax year that I subscribe to this cash ISA*
 - 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 Nationwide Building Society 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;
 - This application form has been completed to the best of my knowledge and belief. I will inform you without delay of any changes in my circumstances affecting any of the information given in this form;
- Also-
- I authorise you to make on my behalf any claim to relief from tax in respect of my ISA investments;
 - I authorise you to hold my cash subscriptions and any interest earned on those subscriptions;
 - I agree to the terms and conditions of the Nationwide cash ISA (copies available on request).

*NB The Nationwide cash ISA (the ISA) can comprise all or any of our cash ISA products, which includes any cash ISA provided by the former Portman Building Society and consequently subscriptions to more than one of these ISA products does not constitute a subscription to another cash ISA for the purposes of paragraph (d) of the declaration above.

**Couples registered under the Civil Partnership Act 2004

NB The following wording applies to all customers.

By signing this application form:

- You confirm that the information you have given in this application form is true and complete and that the money you are investing is your own.**
Please note that we may decline your application.
- You agree that, if your account is opened by us:**
 - You will be bound by the account terms and conditions set out in your product guide that you received with this application form;**
 - You will become a member of Nationwide (if you are not already a member) and be bound by our Rules.** You can get a copy of our Rules at any of our branches and you can also find them on our website at nationwide.co.uk.
 - You will be bound by our charitable assignment scheme.** Unless you have been a member of Nationwide continuously from 2 November 1997 or fall into a special group to which the scheme does not apply, you agree to be bound by the terms of our charitable assignment scheme as set out in the section headed "Important Information: Our Charitable Assignment Scheme" in your product guide that you received with this application form. Under the scheme:
 - You will become a member of Nationwide Foundation if you are not a member already. The Foundation is a registered charity and is a focus for our charitable giving.
 - You agree with us and with the Foundation to assign to the Foundation your rights to any windfall benefits you might otherwise have received in the unlikely event that we transfer our business to a company; and
- Use of your information**
 - We will use the information you provide to open and administer your account. We may obtain and share information about you with credit reference agencies and fraud prevention agencies. You can find information about how Nationwide uses your personal information in the "Use of My Information" section of your product guide that you received with this application form.
 - If you are a new Nationwide customer and do not wish to receive information about Nationwide's products and services** by letter, telephone or email, or any combination of these, you can write to us at Nationwide Building Society, Marketing Opt Out, FREEPOST SCE 7125, Swindon SN38 9LY
- You can ask for a copy of your product guide at any branch or find it at nationwide.co.uk

You must sign here in order for your ISA to be processed.

Signature

<input type="text"/>	Date (please write INSIDE the boxes)	Please tick this box to confirm that you have received the Financial Services Compensation Scheme Information Sheet and Exclusions List <input type="checkbox"/>
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Date received in branch Employee number Branch prefix CHECKED (please mark X in box): of

3

In order for your application to proceed we require you to sign and date the "External Transfer In ISA application" form (SF215)

4

Please make sure you confirm you have read the Financial Services Compensation Scheme (FSCS). Without this confirmation we are unable to process your application.

Your guide to filling in the form

Transfer In

Request to transfer Cash ISA funds to Nationwide

This form will be sent to your current provider to initiate the transfer
This form will be scanned electronically; please write **INSIDE** the boxes in **BLOCK CAPITALS** using black ink as this will help us to process your request faster.
Please ensure that you complete one of these forms for every account you wish to transfer to us.

Important: Please complete all sections and remember to sign and date this form.
If you do not sign it, we cannot contact your current ISA provider to arrange the transfer.

Office use only ISA number

Mr Mrs Miss Ms Other

If you do not know your NI number, see your form P60, notice of tax coding, or your tax return; alternatively your employer or tax office may be able to help.
If you have never been issued with a National Insurance number, please mark X in this

letters numbers I letter

and/or Property name

Postcode

Sort code (if there is one) Account number

Please mark X in ONE box only

Whole balance and close account

All previous years subscriptions

Part of previous years subscriptions

All current year subscriptions

£ * (estimated value if exact amount not known)

I authorise my existing ISA Manager to:

(i) transfer the ISA account detailed above to Nationwide ISA Transfers, NW6026, Swindon, SN38 1NW; and

(ii) provide Nationwide with any information concerning the above cash ISA; and

(iii) accept any instructions from Nationwide relating to the cash ISA being transferred.

Where a period of notice is required for closure/part transfer to my existing cash ISA, I give my consent to either:

1. serve the full notice period before the transaction can be processed:

OR

2. proceed immediately with the transfer and pay any charge or loss of interest that may apply to my account

If further evidence of my investment is required please contact me direct at my home address

I request that you transfer the above mentioned cash ISA Funds to Nationwide Building Society, ISA Transfers, NW6026, Swindon, SN38 1NW.

I have read the section entitled 'Use of my information'. By signing this application I agree that you can use my information in this way. Nationwide may inform you of special offers, products and services, either by letter, telephone or e-mail. If you are a new Nationwide customer and you do not wish to receive marketing material by letter, e-mail or telephone, or any combination of these, you can write to Nationwide at Nationwide Building Society, Marketing Opt-out, FREEPOST SCE 7125, Swindon SN38 9LY. If you are an existing customer your current marketing preference will continue unless you tell Nationwide otherwise. 'Nationwide' means Nationwide Building Society and it's subsidiaries (which include Nationwide Trust Ltd and The Mortgage Works (UK) plc).

Signature _____ Date (please write **INSIDE** the boxes)

PLEASE SIGN WITHIN THIS BOX

Please do not date stamp over important information

Date received in branch Employee number Branch prefix CHECKED (please mark X in box):

_____ of _____

5

Please ensure you complete your National Insurance Number which is required for regulatory purposes. If you're unsure of your NI number please refer to your **P60** or latest tax return. Alternatively your tax office may be able to help.

6

You can chose to select the amount transferred, or complete a part or full cash ISA transfer

7

We will require your consent if a notice period applies before we are able to proceed with your request

8

Please sign and date, giving us authority to contact your ISA provider to arrange the transfer