

Please complete this form if you wish to transfer (merge) existing Yorkshire Building Society cash ISAs.

Your Details

Full Name

 Permanent
Residential Address

Postcode

Date of Birth

 Do you have a National
Insurance (NI) Number?

 Yes No

If Yes, you must enter it here

You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the Department for Work and Pensions (DWP), or a pension letter.

Your Instructions:

I authorise Yorkshire Building Society to transfer my existing cash ISA from account number to my existing Yorkshire Building Society cash ISA number in accordance with my instructions below (please tick box A or B below)

A Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer or

B depending on the terms and conditions, carry out the transfer as soon as possible - I will accept any consequential loss of interest or charges that may be applied.

Please complete **EITHER** section 1 or 2 below

Section 1. Full Transfer

Please close and transfer
ALL of my ISA
as instructed above

Section 2. Part Transfer

 Please transfer £

Does this amount include subscriptions made in the current tax year?

 Yes

 No

NOTE: Subscriptions from current tax year must be transferred in full.

Please forward your ISA passbook/certificate together with these instructions.

I apply to subscribe for a cash ISA for the tax year **2014/2015** and each subsequent year until further notice. (This does **not** obligate you to subscribe).

I declare that:

- all 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; and
- 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 Yorkshire 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.

I authorise Yorkshire Building Society:

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
- to make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the terms and conditions of the account (including the ISA terms and conditions) which have already been provided. I will also be subject to the Rules of the Society (a copy of which can be obtained on request).

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

Signature:

Date:

For Internal Use Only (This form must not be used for ISA transfers from other providers)

Signature Checked

 (Initials)

Branch Code

Staff Number

Date