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Cash ISA to HSBC Fixed Rate Cash ISA Transfer Authority

This form is for **cash** ISA transfers ONLY, you will have been sent a different form if you have requested to transfer a stocks & shares ISA.

Before you start

- If completing by hand, use black ink, BLOCK CAPITALS and initial any alterations.
- You must already have an HSBC Fixed Rate Cash ISA.
- We must receive this form within 30 days of your HSBC Fixed Rate Cash ISA account being opened.
- Please ensure you have signed and dated the form.
- If more than one cash ISA is being transferred, please complete a separate form for each one.
- If you need any further assistance with the completion of this form, please chat with us 24/7 via Online Banking or the HSBC UK Mobile Banking App (subject to maintenance periods). You can also call us or pop into a branch.
- Please hand this completed form into a branch or post to: Customer Service Centre, BX8 1HB.
- For more detail on how we will use your personal information, please see our Privacy Notice at hsbc.co.uk/privacy-notice. You can also ask for a copy in branch.

1. Your personal details (all customers complete)

Please ensure that your personal details held with your current provider match what is included on this form. If details do not match, your transfer may be delayed.

Surname									
Forename(s)									
Date of birth	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Permanent residential address									
	Postcode								

Do you have a National Insurance Number?

Yes ☐ No ☐ If 'Yes', please enter it

If 'No':

Are you eligible to apply for a National Insurance Number? Yes ☐ No ☐

- You should be able to find your National Insurance Number on a payslip, P45 or P60, a letter from HM Revenue and Customs or a letter from DWP.

- If you are eligible to hold a National Insurance Number you must provide this as part of your application. You can check if you are eligible and apply online at Gov.UK > Money and Tax > National Insurance. Your application will be rejected if you do not provide your National Insurance Number or confirm that you are not eligible to hold one.

2. Transfer Authority Form (all customers complete)

Details about the cash ISA you want to transfer.

Name of the existing
ISA provider e.g. bank
or building society

Existing cash ISA details

Branch Sort code

 — —

Bank/Building Society
Account number

Roll number (for
Building Society
accounts only)

Please note: As well as being subject to the terms and conditions of the HSBC Fixed Rate Cash ISA receiving the transfer proceeds, the transfer will be undertaken subject to the terms and conditions applying to your existing cash ISA.

For example:

- Some ISA products do not allow only part of an ISA to be transferred.
- Your existing ISA provider may need you to give them specific information before the transfer can go ahead.
- There may be outstanding fees to pay before the transfer goes ahead.

If you are not sure what conditions apply please check with your cash ISA provider before completing this form.

Current Tax Year's Subscriptions

Do you want to transfer current tax year subscriptions to HSBC?
These are funds added to the ISA you are transferring since 6 April.

Yes ☐ No ☐

Current tax year subscriptions must be transferred as a whole. Partial transfers of current tax year subscriptions are therefore not allowed.

If you ticked 'Yes', how much have you subscribed this tax year?

£

Previous Years' Subscriptions

Do you want to transfer previous tax years' subscriptions?

Yes ☐ No ☐

Do you want to transfer the full amount of previous tax years' subscriptions?

Yes ☐ No ☐

If you ticked 'No', how much do you wish to transfer?

£

Your Transfer Authority

- I authorise my existing ISA provider (as specified above) to transfer the ISA (account number above) to HSBC UK Bank plc.
- I authorise my existing ISA provider to provide HSBC UK Bank plc with required information and to accept any instruction relating to the cash ISA being transferred.
- If a period of notice is required for closure/part transfer of the existing cash ISA, or the existing cash ISA holds a fixed term deposit that has not yet reached its maturity date, I give my consent to either (tick as applicable):

1. Serve the full notice period or wait until the scheduled maturity date (as appropriate) before ☐ this instruction can be processed;

— **IMPORTANT:** Transfers will only be accepted if the notice period/maturity date allows the transfer from your existing ISA provider to be commenced within 30 days of your HSBC Fixed Rate Cash ISA opening date.

— If you are unsure of the dates, please contact your existing ISA provider before continuing.
or

2. Proceed immediately with the transfer bearing any consequential fee which may be payable. ☐

Please sign and print your name in the box below:

Important: If you are signing on behalf of the ISA account holder in your capacity as an attorney, you must hold a valid power of attorney, if you do not the request will be rejected.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Print Name

For Bank use only

Branch contact

Date

D	D	M	M	Y	Y	Y	Y
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Branch stamp

For Banking Operations use only

Transfer Acceptance **(to be completed by HSBC UK Bank plc):**

In circumstances where the funds to be transferred are not cash deposits, please notify us as we will not be able to accept the transfer. Otherwise we, HSBC UK Bank plc, are willing to accept this investor's cash ISA funds, subject to HMRC rules (the ISA regulations) and as long as the following conditions are met.

We must receive the transfer proceeds no later than:

D	D	M	M	Y	Y	Y	Y
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Where the customer has shown above that they want to transfer subscriptions from the current tax year, these must not be more than:

£

For the purposes of the transfer of the ISA under the ISA regulations, the date shown will be the transfer date.

D	D	M	M	Y	Y	Y	Y
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Name of new ISA provider

HSBC UK Bank plc

hsbc.co.uk

HSBC UK Bank plc. Registered in England and Wales with number 09928412. Registered Office:
1 Centenary Square, Birmingham, B1 1HQ, United Kingdom. Authorised by the Prudential Regulation
Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Our
Financial Services Register number is 765112.

Customer Information: Customer Service Centre, BX8 1HB.

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