

## PERSONAL DETAILS

Full Name

Permanent Residential Address

Postcode

Date of Birth

Do you have a National Insurance Number? Yes  No

If 'Yes', you must enter your National Insurance Number here

## DETAILS OF TRANSFER

I apply to transfer my existing cash ISA: (and subscribe to this Cash ISA for the tax year 2010/2011 and each subsequent year until further notice). Delete words in brackets if not subscribing for an ISA for the tax year 2010/2011.

From (name of current provider)

A/C No.  Sort Code

to Newcastle Building Society's  Account

**Please note:** You MUST indicate which of the following statements applies to your ISA transfer:

- This transfer only consists of previous years' ISA subscriptions. **I do not wish to apply to subscribe to a Cash ISA for the tax year 2010/2011 and each subsequent year until further notice. (Please complete either section 1 or section 2).**
- This transfer includes all ISA investment from the current tax year and transfer(s) from previous year ISA subscriptions. **I apply to subscribe to a Cash ISA for the tax year 2010/2011 and each subsequent year until further notice. (Please complete either section 1 or section 2).**
- This transfer includes only ISA investments from the current tax year. **I apply to subscribe to a cash ISA for the tax year 2010/2011 and each subsequent year until further notice. (Please complete either section 1 or section 2).**

**You must complete a separate Customer Acceptance Form for each ISA transfer.**

### Section 1 Full Transfer

Please close and transfer all of my ISA

### Section 2 Part Transfer

Please transfer £  from my ISA

**Note: Subscriptions from this tax year must be transferred in full.**

## IMPORTANT INFORMATION REGARDING YOUR ISA(S)

To help you take advantage of your full tax free allowance, the Newcastle Building Society allows you to invest in a number of ISA products with the Society in this tax year. The combined funds held for the current tax year must not exceed your 2010/2011 annual allowance of £5,100.

(You must not subscribe to an ISA held with another provider in the current tax year.) Newcastle Building Society also allows transfers out of your ISA products invested into the current tax year. The transfer amount must be made up of all balances held by Newcastle Building Society for the current tax year. (Please note: Current year allowances cannot be split between the Society and another provider and some products may have terms that do not allow immediate withdrawal.)

## DECLARATION

### 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 stocks and shares ISA in the same tax year;
- I have not subscribed and will not subscribe more than £5,100 of the overall £10,200 total to a cash ISA.
- 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 and ordinarily 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 Newcastle Building Society if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

## AUTHORITY

### I authorise Newcastle Building Society

- to hold my cash subscription and any interest earned on those subscriptions and
- to make on my behalf any claims to relief from tax in respect of ISA investments.

### 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.**

### Applicant's Signature

### Print Name

### Date

Please return your completed Customer Acceptance ISA Transfer Form either to your local branch or to the following freepost address:

**Newcastle Building Society, FREEPOST NT330, Portland House, New Bridge Street, Newcastle upon Tyne, NE1 1BR**

If you need any help or have any queries please call the Newcastle on 0845 606 5522 or visit your local branch.