wisealpha

ISA Authority for Transfer Form

THIS FORM SHOULD ONLY BE USED TO TRANSFER YOUR CURRENT ISA'S TO THE WISEALPHA ISA

Please note that you are able to transfer in any number of Cash ISAs, Stocks and Shares ISA and other Innovative Finance ISAs.

You can easily transfer your ISAs to **WiseAlpha Technologies Limited (referred to as "WiseAlpha" hereafter)**. All that is required is for you to review, print and email the form to ifisa@wisealpha.com.

Once the form is received we will immediately progress the transfer and will keep you duly informed of updates.

For assistance please contact:



ifisa@wisealpha.com



020 3927 2790

WiseAlpha Technologies Limited (Company No: 08967521) is authorised and regulated by the Financial Conduct Authority (FRN: 751087) with registered office at Level 39, One Canada Square, Canary Wharf, London, E14 5AB . HMRC ISA Manager Reference: Z2018

1 Your details

Title

First Name

Surname

Address

Post Code

Contact Number

Date of Birth
(dd/mm/yyyy)

National Insurance
Number

WiseAlpha Technologies Limited, One Canada Square, Level 39, Canary Wharf, London, E14 5AB

ifisa@wisealpha.com 020 3927 2790

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2 Your current ISA details

Current ISA Manager

Applicable Tax Year/s

ISA Account Number

ISA Sort Code

ISA Reference Number

Please select one of the following options:

1. If you wish to transfer the whole balance (including accrued interest) tick here ☐

2. If you wish to transfer part of the balance please confirm the amount:

£

As per the ISA regulations please note that you are unable to partially transfer the current years ISA Subscription. Only full transfers are permissible for the current years ISA subscription.

Do you have additional ISA's from other tax years or ISA providers that you would like to transfer in? If yes, please complete the 'Additional ISA' section at the end of this form per ISA you would like to transfer in.

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3 Transfer Agreement

Please note that as well as being subject to the terms and conditions of the Innovative Finance ISA receiving the transfer proceeds, the transfer will be undertaken subject to the terms and conditions applying to your ISA.

4 Transfer Authority

- I authorise my current ISA provider to transfer the stated ISA in Section 2 to WiseAlpha.
- I authorise my existing ISA provider to provide WiseAlpha with any information, written or non-written, concerning the ISA and to accept any instruction from them relating to the ISA being transferred.
- I authorise WiseAlpha to hold my subscription and ISA investments, interest and any other rights in respect of those investments and any other cash; and to make on my behalf any claims to relief from tax in respect of my investments.
- I agree to the WiseAlpha ISA terms and conditions.
- I declare that this application form has been completed to the best of my knowledge and belief.

Where I must give notice to close or transfer part of the existing ISA, or the existing ISA contains an investment which is designed and intended to be held for the full term and has yet to reach redemption, I instruct my current ISA provider to:

Carry out the transfer as soon as possible (I am aware of any terms and conditions and any consequential loss of interest and charges with my existing ISA Manager).

Signature _____ **Date** _____

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5 Transfer Acceptance

WiseAlpha are willing to accept this ISA transfer in line with the customer's instruction above, providing the following conditions are met:

- The transfer proceeds are made up of cash deposits only.
- Where the customer has shown above that they want to transfer subscriptions from the current tax year, these must not exceed £20,000. For the purposes of the transfer of the ISA wrapper under ISA regulations, the date shown below will be the transfer date.

Date	
Name of Provider	**WiseAlpha Technologies Limited**

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Additional ISA to be transferred

Current ISA Manager

Applicable Tax Year/s

ISA Account Number

ISA Sort Code

ISA Reference Number

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