

# 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, sign and post this form to us at:

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

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](mailto: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](mailto: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

wisealpha

## 2

## Your current ISA details

Current ISA Manager

Applicable Tax Year/s

ISA Account Number

ISA Sort Code

ISA Reference Number

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.

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

 [ifisa@wisealpha.com](mailto: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

# 3

## Transfer Agreement

You are transferring the entire balance including accrued interest of your ISAs. This will be made up of all previous and/or current year subscriptions.

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 I have not and will not subscribe to another Innovative Finance ISA for the same tax year that I subscribe to this Innovative Finance ISA.
- 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

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

 [ifisa@wisealpha.com](mailto: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

# 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**

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

 [ifisa@wisealpha.com](mailto: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

# Additional ISA to be transferred

Current ISA Manager

Applicable Tax Year/s

ISA Account Number

ISA Sort Code

ISA Reference Number

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

 [ifisa@wisealpha.com](mailto: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

# Additional ISA to be transferred

Current ISA Manager

Applicable Tax Year/s

ISA Account Number

ISA Sort Code

ISA Reference Number

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

 [ifisa@wisealpha.com](mailto: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