

## Transfer a Cash ISA or Stock and Share ISA to Moneyfarm

### Information about the investor

 Forename(s)

 Surname

 Address

 Postcode

 Date of birth DD  MM  YY

 National insurance no.  
(Required by HMRC)

### Existing ISA details

 ISA provider's name

 ISA reference/  
sort code and account no.

 Please tick if Stocks  
and Shares ISA

 Please tick if  
Cash ISA

 ISA provider's  
address

 Total value of ISA  
(Approx) in £

 Current tax year  
contribution in £

 Please tick if you wish  
to transfer full ISA

 Value you wish to transfer  
(if partial transfer) in £

## About the ISA transfer process

When you transfer a Stocks and Shares ISA to Moneyfarm we instruct your current ISA provider to sell all the investments and transfer the proceeds to Moneyfarm. Please check with your current ISA provider if there are any fees you might incur for selling your investments. When you transfer a Cash ISA we convert it into a Stocks and Shares ISA. ISA transfers remain in the ISA wrapper and you don't lose any of your tax advantages. We will keep you informed about the progress throughout the entire transfer.

## Declarations and authorisations

I declare that:

- All subscriptions made, and to be made, belong to me;
- I am 18 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 Stocks and Shares ISA in the same tax year that I subscribe to this Stocks and Shares 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 MFM Investment Ltd 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 MFM Investment Ltd:

- Where the ISA manager is not an insurer-manager, to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; or
- Where the ISA manager is an insurer-manager to hold my cash subscription, any other proceeds in respect of my ISA investments and any other cash; and
- To make on my behalf any claims to relief from tax in respect of ISA investments.

 Signature

 Date


Need to talk to us?

0800 433 4574

### Moneyfarm internal use only

Sort code  Account number  Reference

Authorised signatory  Date

Stamp here