

Transfer Authority Information

Third Platform Services Limited - ISA Plan Manager (Z1888)

Only complete this form if you are transferring an existing ISA holding to Wellesley.

Personal Details

Title: Mr <input type="checkbox"/> Dr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/>	Address: <input type="text"/>
First name: <input type="text"/>	<input type="text"/>
Last name: <input type="text"/>	<input type="text"/>
Date of birth: <input type="text"/> / <input type="text"/> / <input type="text"/>	Post code: <input type="text"/>
National insurance number: <input type="text"/>	Phone number: <input type="text"/>
If you do not have national insurance number, tick here: <input type="checkbox"/>	Wellesley account number: <input type="text"/>

For your own benefit and protection you should read the Terms and Conditions of Third Platform Services Limited which will form part of your agreement with us.

Declaration - Please ensure you have read and agree to this declaration before you transfer

I authorise Third Platform Services Limited: **(a)** To hold my cash subscriptions, ISA investments, interest, dividends and other rights or proceeds in respect of those investments and any other cash **(b)** To make on my behalf any claims to relief from tax in respect of ISA investments. I have not subscribed, and will not subscribe more than the overall subscription limit in total to a Stocks & Shares ISA, a Cash ISA, Lifetime ISA and an Innovative Finance ISA in the same tax year. I declare that I am 18 years of age or over.

For my own benefit and protection I have been given the opportunity to read the Terms and Conditions carefully and have had any questions I had concerning them answered to my satisfaction.

I agree to the Terms and Conditions.

ISA Transfer Authority - Please complete a separate transfer form for each ISA you wish to transfer

ISA company's name: <input type="text"/>		
ISA sort code (if applicable) <input type="text"/>	ISA reference to be transferred: <input type="text"/>	
Current address: <input type="text"/>	Approximate transfer value: <input type="text"/>	
<input type="text"/>		
<input type="text"/>	Is this a partial transfer? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Post code: <input type="text"/>	Existing ISA type: Stocks and shares <input type="checkbox"/> Cash <input type="checkbox"/>	
	Innovative finance <input type="checkbox"/> Lifetime <input type="checkbox"/>	

I authorise the transfer of my entire ISA to the Third Platform Services Stocks & Shares ISA as cash

Subscriptions made in current tax year:

I authorise you to discuss this transfer with Third Platform Services by telephone and/or via correspondence sent to 'Third Platform Services Limited, 17 Neal's Yard, London, WC2H 9DP'

I have read and agreed to the declaration above.

Signature: _____

Date: / /

Full name:
(BLOCK CAPITALS)