

Scottish Widows Platform ISA Transfer In Request Form

This form should be used to transfer in an ISA with another provider into an ISA with the Scottish Widows Platform.

Complete all details requested and ask the account holder to read and sign the declaration. Once completed please return the form, alongside the transfer form generated online when the application is submitted, to: Scottish Widows Platform PO Box 24065, 1 Tanfield, Edinburgh, EH3 1EY. This form should only be completed for transfers which cannot take place electronically.

1. Details

Customer ID:

Scottish Widows Platform ISA account details

Account Reference Number:

Full Name:

Date of Birth:

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National Insurance Number:

Address:

Postcode:

2. Transfer authority

Please transfer the following ISA to be held in a Scottish Widows Platform Stocks & Shares ISA.

ISA Account Number:

To: (existing ISA Manager):

Name:

Address:

Postcode:

Daytime Phone Number

By signing this form I authorise you, the Plan Manager, to: Transfer my Individual Savings Account (ISA), as specified above, to EISL.

In cash

Re-registration

Both


Provide any information that Scottish Widows Platform, or Embark Investment Services Limited as their administrator, may require, on my behalf including, but not limited to, details of the current plan(s) and value(s), and transaction and dividend histories.

5. Client confirmation

We recommend that before signing this form you have read the terms and conditions of the Scottish Widows Investment Account and Scottish Widows Stocks & Shares Individual Savings Account.

By signing this form I understand that:

- My current Plan Manager may not support the re-registration transfer, and may sell my holdings (i.e. 'encash' them) and send the money to the Scottish Widows Platform. In this instance, the Scottish Widows Platform will confirm to me/to my financial intermediary, the amount of money received.
- If I have not provided the Scottish Widows Platform with any investment instructions, any money received from the transferring plan manager by 'encashment' will remain un-invested. I do, however, confirm the cash will be held for the purpose of investment.
- The Scottish Widows Platform will consolidate all my ISAs held on the platform into one Scottish Widows Stocks & Shares Individual Savings Account (ISA).

Signature: 

Date:

Please send this form to your adviser when complete. If you have any queries concerning this form, please contact your adviser.


6. Checklist

Please tick the boxes below:

The details have been checked and are correct

Any Direct Debits or standing orders have been cancelled

This transfer form has been signed and dated

 0330 024 2345

 service@scottishwidowsplatform.co.uk

 scottishwidows.co.uk/platform

Scottish Widows Platform is a trading name of Embark Investment Services Limited, a company incorporated in England and Wales (company number 09955930) with its registered office at 33 Old Broad Street, London, EC2N 1HZ. Embark Investment Services Limited is authorised and regulated by the Financial Conduct Authority (Financial Services Register number 737356).