

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:

	D		D		M		M		Y		Y		Y		Y	
--	---	--	---	--	---	--	---	--	---	--	---	--	---	--	---	--

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.

3 Transfer instructions

(a) Cash ISA

Amount to be transferred:

☐ 1. Entire Cash ISA OR ☐ 2a. Current year subscriptions ☐ 2b. Previous year subscriptions*

* If you are transferring previous years subscriptions, enter all or specify the amount to be transferred: £

(b) Stocks & Shares ISA

Amount to be transferred:

☐ 1. Entire Stocks & Shares ISA OR ☐ 2. Stocks & Shares ISA in part (Go to section 4)

Any cash you have paid into an ISA this tax year must be transferred in full.

4 Transferring a stocks & shares ISA

Transfer only part of my ISA. You don't need to complete this section if you're transferring in full.

Please indicate below how you wish to transfer your Stocks & Shares ISA to the Scottish Widows Platform.

Cash only ☐ Cash and investments ☐ Cash amount to be transferred*: £

* This is the approximate value and will depend on share prices at the time of sale.

Investment to be Transferred

Investment Name	ISIN/SEDOL	Units	Value (£)

Please continue on a separate sheet if necessary.

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:

	D		D		M		M		Y		Y		Y		Y
--	---	--	---	--	---	--	---	--	---	--	---	--	---	--	---

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