

ISA Transfer Form

To transfer a Cash ISA from another provider to Vida Savings, you need to open a Vida Savings Cash ISA. You can transfer into a Vida Savings Easy Access ISA, or Defined Access ISA at any time, and into a Vida Savings Fixed Rate ISA at account opening stage only.

If you haven't yet opened a Cash ISA with us, please visit www.vidasavings.co.uk. Please be aware, you'll need a new form for each Cash ISA you're transferring.

This form should only be used to request the transfer of an existing Cash ISA to Vida Savings.

If you wish to transfer a Stocks and Shares ISA instead, you'll need a different transfer form which can be found under the Useful Documents section of our website www.vidasavings.co.uk.

Please complete the form in BLOCK CAPITALS and return to us at Freepost VIDA SAVINGS, or via email at enquiries@secure.vidasavings.co.uk.

Customer Details

A | (Client) Account No or Application Reference No:

B | First name(s)

C | Surname

D | Date of birth (dd/mm/yy)

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E | National insurance number

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F | Permanent residential address

Postcode

Customer Details Guide:

To help identify you quickly; Enter your details ensuring each section is completed using black ink. **Use upper-case for alphabetical characters.** Examples are provided below.

A - Ensure your Account - Application Reference is entered in the format displayed. *eg. 1234567891234* if using your 13 digit Vida Account No. or *123456789* if using your Application Reference No.

B - Provide your first name **as it appears on your account.**

JOHN

C - Provide your surname **as it appears on your account.**

SMITH

D - Ensure your Date Of Birth is entered in the following format

0	1	0	2	1	9	8	0
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E - Enter your National Insurance number in the following format

A	B	-	1	2	3	4	5	6	-	C
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F - Enter your permanent residential address **as it appears on your account.**

FLAT/HOUSE NO/NAME

NE28 5BT

STREET NAME

TOWN/CITY

ISA Transfer Details

G | Existing Provider Name:

H | Sort Code: (If you do not have a sort code skip to J)

			–				–			
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I | Account Number: (If this exceeds 8 digits skip to J)

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J | Roll/Reference No (If applicable):

K | Do you want to transfer all or part of this Cash ISA?

☐ All ☐ Part

If you have selected 'All' skip to section 3. Otherwise continue below.

L | Confirm from the options below which subscriptions you would like to transfer:

Current year subscriptions only ☐

Previous year subscriptions only ☐

Current year subscriptions & part of previous year subscriptions ☐

N | How much of your ISA would you like to transfer?

£	<input type="text"/>
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ISA transfer details guide: To minimise delays to your transfer, enter your details ensuring relevant sections are completed using black ink.

G – Enter the name of your existing ISA provider.

HALIFAX

H – Enter your ISA's sort code in the following format

1	2	–	3	4	–	5	6
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I – Enter your ISA's 8 digit account number

1	2	3	4	5	6	7	8
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J – Enter the roll or reference number of your ISA. If you are unsure of this you may wish to confirm this with your existing provider.

K – Clearly indicate by ticking **one of the boxes provided** whether you want to close your ISA and transfer all funds **including unpaid interest** (All) or whether you wish to transfer a partial amount (Part).

L – If you have specified above that you wish to transfer part of your ISA clearly indicate by ticking **one of the boxes provided** to confirm if these funds are from the current/previous tax year or a combination of both.

Important note – Current year subscriptions can only be transferred in full.

N – Clearly state the amount you wish to transfer using the following format.

£	£19,999.99
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*Important note – HMRC timescales for a **Cash ISA transfer is 15 business days**, should your ISA transfer exceed this timescale then interest will be backdated from the 16th business day **so long as the information provided above is correct.***

Authorisation

I authorise my existing ISA provider to transfer my Cash ISA to Vida Savings and share relevant information with them. I also authorise my existing ISA provider to follow Vida Savings' instructions regarding the transfer. If notice is required to close or transfer the ISA, or it contains a fixed-term deposit that hasn't matured, I instruct my provider to:

- ☐ 1. Wait for the full notice period to end or wait until maturity (whichever is applicable) before going ahead with the transfer
- OR
- ☐ 2. Depending on the terms and conditions of my account, carry out the transfer as soon as possible.
- I accept any consequential loss of interest or charges that may be applied.

Ensure all information provided above is accurate, if satisfied sign and date, our postal address can be found below.

Signature:

Date (dd/mm/yy)

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If you're returning your completed ISA Transfer Form, you can do so by:

Post:

Freepost VIDA SAVINGS

This is a freepost address, there is no need for a stamp.

OR

Email:

enquiries@secure.vidasavings.co.uk

Please note that a failure to complete this form fully may result in a delay in the transfer.

If you need any help or assistance

Please call us on 0345 6460 460 or email us at enquiries@secure.vidasavings.co.uk.

Vida Savings is a trading name of Vida Bank Limited, registered in England and Wales with company number 09837692 with its registered office at 1 Battle Bridge Lane, London, SE1 2HP. Vida Bank Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority with Financial Services Register Firm Reference Number 738741.