

Cash to Cash ISA Transfer Application Form



Please complete in BLOCK CAPITALS using BLACK INK. **PLEASE NOTE:** Any applications received that are not completed correctly may incur delays or may have to be returned to you.

Applications to transfer your existing Cash ISA into a Fidelity Cash ISA can only be accepted using original forms. Photocopies or faxed copies cannot be accepted. Complete one Cash to Cash ISA Transfer Application form, regardless of the number of ISA Managers that you are transferring ISA proceeds from.

This Application Form MUST be submitted with fully completed ISA Transfer Letter(s) of Authority

1 Personal Details and Legal Requirements

TITLE	SURNAME	MALE	OR	FEMALE
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>

FIRST NAME(S) IN FULL

ADDRESS ("Care of" and PO Box are not acceptable. Only UK mainland and Northern Ireland addresses are eligible)	EXISTING CLIENTS ONLY
HOUSE NUMBER AND/OR HOUSE NAME	ACCOUNT NUMBER OR CLIENT NUMBER

<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
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STREET, CITY, COUNTY AND COUNTRY DETAILS	CONTACT TELEPHONE NUMBER (in case of query)
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<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>

POSTCODE	DATE OF BIRTH
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>

NATIONAL INSURANCE NUMBER (Will be 9 characters: 2 letters, 6 numbers followed by the letter A, B, C, or D.)	→ NO NATIONAL INSURANCE NUMBER? If you have never been issued with a National Insurance Number please mark an X in the box.	CROWN EMPLOYEE/SPOUSE OF CROWN EMPLOYEE? If your address is outside of the UK and you are a Crown Employee or the spouse/civil partner of a Crown Employee please mark an X in the box. Please refer to the legal declaration in Section 3 for an explanation.
<input style="width: 100%; height: 20px;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 Investment Details

If you wish to transfer to a Stocks and Shares ISA please contact Fidelity for the appropriate form.

All Cash ISA transfers using this form will be invested into the MoneyBuilder Cash ISA.

FUND CODE	FUND NAME	% OF YOUR ISA PROCEEDS TO BE INVESTED
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>

Income Option? This option is not available for the MoneyBuilder Cash ISA Fund. If you invest in this fund all income will be automatically reinvested.

PLEASE TURN OVER

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