ISA Transfer Form

This form lets you transfer an existing ISA into an ISA with Söderberg & Partners Wealth Management.

Seccl Custody Limited (SCL) is the ISA Manager in respect of the Söderberg & Partners Wealth Management ISA. SCL is approved by HM Revenue & Customs for this purpose. The Söderberg & Partners Wealth Management ISA managed by SCL is a stocks and shares ISA.

If you do not already have a Söderberg & Partners Wealth Management ISA you will need to apply for one before submitting this form.

Your details

|  |  |
| --- | --- |
| Title (if any) |   |
| Full name |   |
| National insurance number  |   |
| Date of birth |   |
| Email address |   |
| Permanent residential address    |   |
| SPWM reference / account ID |   |

ISA Transfer Authority

|  |  |
| --- | --- |
| Current ISA provider  |   |
| Current ISA reference / account number |   |
| Type of ISA with current provider (cash or stocks and shares ISA?) |  |
| Partial or full transfer? |   |
| Transfer value |   |
| In-specie or cash? |  |
| Is this transfer coming from the current or prior tax year’s annual ISA subscription allowance? If prior, please confirm the tax year. |  |

Declaration

I declare that:

* I have read and understood the Söderberg & Partners Wealth Management terms and conditions and key features document;
* I give authority to Söderberg & Partners Wealth Management and ISA manager (Seccl Custody Ltd) to transfer my ISA;
* Information provided in this application is correct to the best of my knowledge. I will notify Söderberg & Partners Wealth Management of any changes to the information provided;
* I accept that Söderberg & Partners Wealth Management will not be liable to any losses incurred as a result of any delays in the transfer to my Söderberg & Partners Wealth Management ISA;
* I am the beneficial owner of any assets being transferred and will remain so once the asset have moved into the Söderberg & Partners Wealth Management ISA;
* I accept that Söderberg & Partners Wealth Management will not be liable to any costs or fees levied by the existing ISA Manager;

Transfer Instruction

I hereby authorise my existing ISA provider to:

* Transfer my existing ISA as specified to Söderberg & Partners Wealth Management;
* Provide any information necessary to Söderberg & Partners Wealth Management and SCL to facilitate the transfer;
* Cancel any direct debits currently in place with immediate effect if I have chosen to transfer my current tax years subscriptions;
* Deduct any charges for the transfer as specified within your terms and conditions.

I have read and agreed to the declaration above:

|  |  |
| --- | --- |
| Name  |   |
| Date |   |
| Signature |   |

Transfer Acceptance

*For the attention of the ceding provider.*

Please make the payment to the following details:

Account Name: Seccl Custody

Account Number: 17190968

Sort Code: 308012

Payment Reference: \* insert SPWM Account ID\*

Please note, we do not accept payment by cheque.

Please send all correspondence relating to the transfer to servicecentre@soderbergpartners.com.