



ISA Transfer Form

This form lets you transfer an existing ISA into an ISA with Söderberg & Partners Platform Limited.

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 Platform Limited 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 / SCL 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?	
Amount to transfer (if partial)	
In-specie or cash?	

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 SCL Account ID*

Please note: we do not accept cheques or postal forms.

Please send all correspondence relating the transfer to servicecentre@soderbergpartners.com and transfers@secl.tech.