

HL STOCKS AND SHARES ISA TRANSFER FORM

Office use only
IMST3

Use this form to transfer your existing Witan Wisdom ISA to the HL Stocks and Shares ISA.

Section 1 Personal details – complete all sections in BLOCK capitals

Title (Mr, Mrs etc)		Own forename(s)						Own surname							
Date of birth	D	D	M	M	Y	Y	National Insurance no.							Tick here if you have no NI No.	<input checked="" type="checkbox"/>
Nationality															
Own address 1															
Own address 2															
Own address 3															
Own address 4															
Own address 5												Own postcode			
Email address										Main telephone no.					

Hargreaves Lansdown would like to contact you about the services we offer which may be of interest to you. We explain how we use your personal data in our Privacy Policy.

If you would like to hear from us, please tick the relevant box(es) below:

Email – please contact me by email **Phone** – please contact me by phone

Section 2 Your bank account – this is where we will pay any income or cash withdrawals

Leave blank if you've already registered a UK bank account with us.

Name of account holder	Sort code			-			-		
Roll number or building soc. ref	Account number								

Section 3 ISA transfer authority

Please transfer the below Witan Wisdom ISA(s) to the Hargreaves Lansdown Stocks and Shares ISA

ISA account/reference number

I authorise Witan to discuss this transfer with Hargreaves Lansdown, including by telephone and to cancel my associated monthly savings with immediate effect. I have read and agreed to the declaration below.

Signature: **X** Date

Full name:

Section 4 Income instruction – once you've transferred, what would you like to do with any income from your investments?

Please tick one option **ONLY**. Leave blank if you've already told us your income preference and do not wish to change it.

A **REINVEST MY INCOME AUTOMATICALLY** **C** **HOLD MY INCOME AS CASH IN MY ISA**

B **PAY MY INCOME TO MY NOMINATED BANK ACCOUNT**

Section 5 Declaration – please sign and agree above

For your own benefit and protection you should read our Terms & Conditions carefully before committing to an investment. If you do not understand any point please ask us for further information. When you use our services we will take this as acceptance and agreement of our terms, and you will be bound by them.

I have read, agreed to and retained the Terms & Conditions, the Important Investment Notes and Key Features of the Hargreaves Lansdown (HL) Stocks and Shares ISA and my chosen investment including all costs and charges and, where available, the Key Investor Information Document/Key Information Document provided to me on paper or via www.hl.co.uk. The declaration and the information I will give in my application is correct to the best of my knowledge and belief and shall be the basis of the contract between me and HL. I will notify HL without delay of changes to these particulars. I have not received advice from HL regarding the suitability of the HL Stocks and Shares ISA or any aspect of this investment.

I authorise HL to: (a) Hold my cash subscriptions, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; and (b) Make on my behalf any claims to relief from tax in respect of ISA investments. I declare that I am 18 years of age or over.