

Transfer a Cash or Stocks and Shares ISA to Nutmeg

1 Print and complete the form then 2 post it to us where 3 we will transfer some or all of your existing Cash or Stocks & Shares ISA to become a Stocks & Shares ISA with Nutmeg.

Application details

Your details

Title	First name(s)	Last name
Date of birth	DD / MM / YYYY	Nutmeg a/c no.
House name	Flat and/or house number	Street
Town	Postcode	
Telephone no.	National insurance no.	Required by HMRC for ISA

Existing ISA details

IMPORTANT You can't transfer Help to Buy or Lifetime ISAs to Nutmeg. Visit nutmeg.com/htb

ISA provider's name	ISA provider's postcode
ISA provider's address	
Stocks & Shares ISA reference no.	Or Cash ISA sort code & account no. / ref no.
<p>Transfers of the current year ISA</p> <input type="checkbox"/> Tick this box to transfer the current tax year. Partial transfers are not permitted for the current tax year.	<p>Special instructions for your existing ISA provider, if any</p> <p>E.g. "Only transfer ABC fund, all other funds should remain with you" or "Please process the transfer after you have applied my maturity bonus."</p>
<p>Transfers of previous year ISA amounts</p> <input type="checkbox"/> Tick this box if you want to transfer your entire ISA; OR <input type="checkbox"/> Tick this box if you want to transfer part of your ISA, and indicate in the space below the value to be transferred:	
<p>Amount of ISA to transfer £</p>	

We suggest you contact your existing ISA provider to check if exit fees may apply on your transfer. Some providers sell shares more cheaply if you contact them yourself and deal over the phone. If you do this, ensure your provider does not send the proceeds of the sale to your bank account as these funds would lose their ISA wrapper. Your existing ISA provider must hold the proceeds of the sale as cash on your account awaiting our request to transfer.

Declarations and Authorisations

I am 18 years of age or over, and am resident and ordinarily resident in the United Kingdom for tax purposes. I will inform Nutmeg if I cease to be resident and ordinarily resident. All subscriptions made, and to be made, belong to me. I have not subscribed, nor will I subscribe more than the overall subscription limit in total to a cash ISA and a stocks and shares ISA in the same tax year. I have not subscribed and will not subscribe to another stocks and shares NISA in the same year that I subscribe to the Nutmeg Stocks and Shares ISA. I understand that my existing ISA Manager may charge me to transfer, and that there may be a period of time when I am not invested. I have been provided, have read, and have agreed to Nutmeg's Terms and Conditions, including the Additional Terms for Stocks and Shares ISAs.

I authorise Nutmeg (a) to instruct my existing ISA Manager to sell my entire ISA investments and send Nutmeg the proceeds of the sale. (b) to hold my cash subscription, ISA investments, interest dividends and any other rights or proceeds in respect of my ISA investments and any other cash. (c) to make on my behalf any claims to relief from tax in respect of ISA investments. (d) to discuss with my existing ISA manager any details relating to my existing ISA in order to ensure the completion of the transfer, thereby meeting the requirements under the Data Protection Act 1998.

Signature

Date

All done? Post this form to us at:
Nutmeg, Vox Studios, 1-45 Durham Street, London, SE11 5JH



Any questions?
We're here to help - 020 3598 1515

