

Partial cash or stocks and shares ISA transfer form



- 1 Print and complete
- 2 Post it to us
- 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

Title

First name

Middle name

Last name

Date of birth

D

D

-

M

M

-

Y

Y

Y

Y

National Insurance number (Required by HMRC for ISA)

Nutmeg account number

N

E

Your address

Postcode

Telephone number

Existing ISA details

! IMPORTANT: You can't transfer Help to Buy or Lifetime ISAs to Nutmeg.

ISA provider's name

Stocks & Shares ISA reference no.

or

Cash ISA sort code & account no. or reference no.

ISA provider's address

Postcode

You can tick the transfers of the current year box and one of the previous years boxes, at the same time. We will take this to mean when we are transferring all of this years ISA subscriptions and some of the previous years or all of this years and all of last years.

Transfers of the current year ISA

☐

 Tick this box if you want to transfer all of the ISA subscriptions made in the current tax year. Partial transfers are not permitted for the current tax year.

Transfers of previous year ISA amounts

☐

 Tick this box if you want to transfer all of the ISA subscriptions made in previous tax years.

☐

 Tick this box if you want to transfer part of the ISA subscriptions made in previous tax years, please indicate in the space below the value to be transferred.

Amount of ISA to transfer

£

Note: We are able to receive transfers even if the ISA subscription value on the transfer form does not match the record held by your current provider. As part of the transfer process, the ceding provider sends a transfer history form which we use to update our record of your ISA subscriptions.

Notes for your existing ISA provider or Nutmeg, if any

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."

Transferring an ISA to Nutmeg

When transferring a stocks and shares ISA to Nutmeg we instruct your existing ISA provider to sell the investments and send us the proceeds. Any cash ISA transferred to Nutmeg will become a stocks and shares ISA. ISA transfers remain in the ISA wrapper and you don't lose any of your tax advantages.

We suggest you contact your existing ISA provider to check if exit fees may apply to your transfer.

Declarations and Authorisations

By signing below, I declare that all of the information I have provided or confirmed in this application is correct to the best of my knowledge and belief, and I also declare that:

- I apply to subscribe to a stocks and shares ISA for the tax year 2023/24 and each subsequent tax year until further notice.
- To the extent that I have given Nutmeg transfer instructions, I apply to transfer my funds subscribed in an existing ISA to Nutmeg, in accordance with the details set out in those instructions.
- I am 18 years of age or over, and am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of the Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Nutmeg if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
- All subscriptions made, and to be made, belong to me.
- I have not subscribed/made payments, nor will I subscribe to/make payments more than the overall subscription/payment limit in total to a cash ISA, a stocks and shares ISA, an Innovate Finance ISA, and a Lifetime ISA in the same tax year.
- I have not subscribed and will not subscribe to another stocks and shares ISA in the same tax year that I subscribe to the Nutmeg stocks and shares ISA.
- I have been provided, have read, and have agreed to [Nutmeg's Terms and Conditions](#), including the [Additional Terms for stocks and shares ISA](#).

Furthermore, I authorise Nutmeg Saving and Investments to:

- Hold my cash subscription/payment, ISA investments, interest, dividends, and any other rights or proceeds in respect of my ISA investments and any other cash.
- Make, on my behalf, any claims to relief from tax in respect of ISA investments.
- If I have given transfer instructions to Nutmeg, instruct the existing ISA Manager to sell the ISA investments and send Nutmeg the proceeds of the sale.
- If I have given transfer instructions to Nutmeg, discuss with the 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 2018.

I make the stocks and shares ISA declarations and authorisations set out above.

Your signature

Today's date

D

D

-

M

M

-

Y

Y

Y

Y

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**