

APPENDIX 2 - ISA TRANSFER AUTHORITY

If you would like to transfer some or all of your existing ISA investments from previous years, please provide the following information. Please photocopy this page for each provider.

Name of Existing Manager:	
Address:	
Postcode:	
Client Full Name:	Date of Birth:
Reference or Account Number:	National Insurance (NI) Number:
Stocks and Shares ISA:	
Please tick all that apply:	
<input type="checkbox"/> I wish to transfer the whole of my current year's ISA subscription	
<input type="checkbox"/> I wish to transfer all my previous years' ISA subscriptions	
<input type="checkbox"/> I wish to transfer £_____ or ____% of my total ISA holding	
<input type="checkbox"/> Please enter the appropriate value	
<input type="checkbox"/> I wish to transfer the specific tax year ____ / ____	
<input type="checkbox"/> Please enter the appropriate tax year e.g. 2007/2008	

I confirm that I wish to transfer the ISA(s) detailed above to R.C. Brown Investment Management PLC (RCBIM) and authorise you to:

- (i) comply with all instructions given to you by RCBIM regarding the transfer of my cash and/or my investments;
 - (ii) liaise with RCBIM whom I have already informed of my transfer request and send a closing statement of my ISA(s) to RCBIM;
 - (iii) provide the information required under HMRC ISA Regulations, within the timescale stated in the Regulations, to RCBIM;
- and
- (iv) forward all outstanding dividends and tax credits to RCBIM with full supporting details.

Signed:	Date:
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Head Office:

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