

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 complete a separate form 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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