

APPENDIX 2 – ISA TRANSFER AUTHORITY

If you would like to transfer some or all of your existing ISA investments, 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:

- I wish to transfer £_____ or _____% of my current year's ISA subscription *
- I wish to transfer £_____ or _____% of my previous years' ISA subscriptions
- I wish to transfer £_____ or _____% of my total holding
- I wish to transfer the specific tax year _____ / _____

The above requested transfers should be made:

- In specie
- In cash

*Please confirm with your existing ISA Manager that they accept partial transfers of current tax year ISA subscriptions

I confirm that I wish to transfer the ISA(s) detailed above to RC Brown Investment Management, to be held in an **RC Brown Investment Management (RCBIM) Stocks & Shares ISA** and authorise you to:

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

Signed:	Date:
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All correspondence to Head Office

Head Office:
1 The Square, Temple Quay, Bristol BS1 6DG

tel: 0117 925 6073 **email:** enquiries@rcbim.co.uk **www.rcbim.co.uk**