R.C. BROWN
investment management plc

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.

Existing Manager Details

Name
Address

Client Details

Full Name
Address
Date of Birth
National Insurance (NI) Number:
Reference / Account Number:

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

If this is a fixed term ISA, I am happy to accept any early-closure penalties that may be applicable

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

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

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:

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

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