

## Sanlam Portal ISA additional transfer Information form

**Important:** This form is only to be used to provide information on additional transfers that are being made at the time of applying for a new Sanlam Portal ISA.

|                              |                      |               |                      |
|------------------------------|----------------------|---------------|----------------------|
| Title (Mr/Mrs/Miss/Ms/other) | <input type="text"/> | Surname       | <input type="text"/> |
| Forename(s) (in full)        | <input type="text"/> |               |                      |
|                              | <input type="text"/> | Date of birth | <input type="text"/> |

### Transfer details

|                          |                        |
|--------------------------|------------------------|
| Estimated transfer value | £ <input type="text"/> |
|--------------------------|------------------------|

### ISA transfer authority form

**Please complete this form and we will forward it to your existing ISA manager.**

Your existing ISA details:

|                    |                      |          |                      |
|--------------------|----------------------|----------|----------------------|
| ISA manager's name | <input type="text"/> |          |                      |
| Address            | <input type="text"/> |          |                      |
|                    | <input type="text"/> |          |                      |
|                    | <input type="text"/> | Postcode | <input type="text"/> |

Account or reference number(s) of the ISA(s) you wish to transfer

|                      |
|----------------------|
| <input type="text"/> |
| <input type="text"/> |
| <input type="text"/> |

Please state what you wish to transfer by ticking the appropriate box or boxes:

|                        |                                                |                                   |                                                 |
|------------------------|------------------------------------------------|-----------------------------------|-------------------------------------------------|
| <b>The whole of my</b> | Stocks and Shares ISA <input type="checkbox"/> | Cash ISA <input type="checkbox"/> | Innovative Finance ISA <input type="checkbox"/> |
|------------------------|------------------------------------------------|-----------------------------------|-------------------------------------------------|

**Note:** By completing this Transfer Authority form you are agreeing to transfer the entire existing ISA which may be comprised of subscriptions paid in the current tax year, previous tax years or both current and previous tax years.

**Please sign the authority below:**

I consent to you as my existing ISA manager giving Sanlam Financial Services UK Limited full details of my ISA(s).

I authorise you to sell my ISA investments on receipt of this form to the extent necessary to make the transfer and to send the proceeds (including uninvested cash that applied to the ISA(s) I am transferring) to 'Sanlam Financial Services UK Limited'.

I request that you transfer any payments, dividends, and any other rights subsequently received in respect of the ISA(s) I am transferring to 'Sanlam Financial Services UK Limited'.

Full name

Signature

Date

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