

Authorisation to transfer from another provider

You can use this form to transfer an existing ISA into Octopus Titan VCT ISA. If you are transferring more than one ISA, please complete a new authorisation form for each ISA you are transferring. This form should be used in conjunction with the Octopus Titan VCT ISA Application and ISA Transfer form. Go to octopusinvestments.com/investor/document-library to download additional copies of this form.

Please complete all fields.

Section 1 – About the investor

Customer details	Title <input type="text"/>	First name(s) <input type="text"/>	Last name <input type="text"/>
Date of birth DD MM YYYY	<input type="text"/>		
Postcode	<input type="text"/>		
National Insurance number	<input type="text"/>		

Section 2 – Authorisation to transfer from another provider

I have a (Tick one box only)	<input type="checkbox"/> Stocks and Shares ISA, OR <input type="checkbox"/> Cash ISA
Please transfer my ISA (Please note we only take transfers from previous tax years)	<input type="checkbox"/> In full, OR <input type="checkbox"/> In part – please complete the below section, and check with your existing ISA Manager that they can accommodate a partial transfer.
ISA INVESTMENTS TO BE TRANSFERRED IN PART	
Please transfer <input type="text"/> % of my total ISA holding, OR please transfer specific tax years as detailed below. Please note we only take transfers from previous tax years e.g. 2016/17 or earlier.	
1. <input type="text"/> / <input type="text"/> 2. <input type="text"/> / <input type="text"/> 3. <input type="text"/> / <input type="text"/> 4. <input type="text"/> / <input type="text"/>	
Estimated value of transfer	£ <input type="text"/>

Section 3 – Details of current ISA manager

Company name	<input type="text"/>		
Account number of the ISA to be transferred	<input type="text"/>		
Sort code (if your ISA is held by a bank)	<input type="text"/>	Telephone number	<input type="text"/>
Address	<input type="text"/>		
Country	<input type="text"/>	Postcode	<input type="text"/>

Section 4 – Transfer instruction

Transfer instruction	I hereby instruct my current ISA manager to transfer the ISA referred to in this form, to Octopus Investments Limited (my new manager) by liquidating the assets and forwarding the proceeds to Octopus Investments Limited. I authorise my existing ISA manager to provide Octopus Investments Limited with any information, written or non-written, concerning the ISA and to accept any instructions from them.
Applicant signature	<input type="text"/>
Date signed DD MM YYYY	<input type="text"/>