

Octopus AIM Inheritance Tax ISA

Authorisation to transfer from another provider

octopusinvestments
A brighter way

How to complete this form

You can use this form to transfer an existing ISA into your Octopus AIM Inheritance Tax ISA. If you are transferring more than one ISA, please complete a new authorisation form for each ISA you are transferring. **This form must be used in conjunction with either the full Octopus AIM Inheritance Tax ISA application form or top-up form, depending on whether you are opening a new portfolio or adding to your existing investment. Please complete all fields.**

Section 1 – About the investor

Title	First name(s)	Last name
Date of birth (dd mm yyyy)	National Insurance number	Postcode

Section 2 – Details of current ISA Manager

Company name	Account number of the ISA to be transferred
Sort code (If your ISA is held by a bank)	Telephone number
Address	
Country	Postcode

Section 3a – Authorisation to transfer your ISA in full

I have a (tick one box only)

Stocks and Shares ISA ☐ OR ☐ Cash ISA

Please transfer

Estimated value of transfer £

If you'd like to transfer your ISA in part, please complete **Section 3b**.

Section 3b – Authorisation to partially transfer your ISA

I have a (tick one box only)

Stocks and Shares ISA ☐ OR ☐ Cash ISA

Please transfer

% of my total ISA holding ☐ OR ☐ please transfer specific tax years as detailed below.

Tax year (e.g. 2024/25)		/			/			/	
Specific value of partial transfers £									

Please choose how you would like your current ISA funds to be sold down

Sell proportionally across all funds (excluding suspended funds) **OR** Sell from the specific funds below

Fund name

% of my holding **OR** Amount of shares

Fund name

% of my holding **OR** Amount of shares

Fund name

% of my holding **OR** Amount of shares

Fund name

% of my holding **OR** Amount of shares

Section 4 – 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

Print name

Date signed (dd mm yyyy)

 0800 316 2295
investorsupport@octopusinvestments.com
octopusinvestments.com

 Send completed form to:
Octopus Investments
PO Box 10847
Chelmsford CM99 2BU