

Authorisation to transfer from another provider

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.** Go to octopusinvestments.com/investor/document-library to find copies of these forms.

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 Stocks and Shares ISA, **OR** Cash ISA
(Tick one box only)

Please transfer my ISA In full, **OR**
 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 % of my total ISA holding, **OR** please transfer specific tax years as detailed below (e.g. 2016/17).

1. / 2. / 3. / 4. /

Estimated value of transfer
£

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

Date signed
DD MM YYYY