

Transfer Your Individual Savings Account (ISA)

Let us take care of your ISA transfer

We've made transferring to True Potential Investor quick and easy with our simple ISA transfer form.

Don't worry if you can't find all of the details of your ISA, our dedicated team of experts can work with you to find this information. We'll also look after your transfer from start to finish, doing all the work for you.

We're available on 0800 046 8007 from 8am to 8pm weekdays to help with any questions.

Why Transfer?



Track your ISA 24/7



Top up your account with our award-winning technology, impulseSave®, from as little as £1



Opportunity for greater potential growth by consolidating your accounts

1. Your Personal Details

First Name

Last Name

Date of Birth

Home Address

Post Code

National Insurance
Number

If you need any help with transferring, would like to transfer part of an ISA or are unsure of anything on this form, call our Transfer Team on 0800 046 8007.

2. ISA to Transfer

ISA Provider Name

Account Number

Type of ISA

Cash ISA

Stocks & Shares ISA

Estimated Value

£

Amount to Transfer

Full Amount

Other (Please Specify)

£

3. Declaration

- I have read and accepted the True Potential Investments Stocks & Shares ISA Key Features Terms & Conditions.
- I authorise True Potential Investments to arrange for the sale of all assets held in my above-named ISA and to the transfer of cash proceeds into my True Potential Investments ISA.
- I have checked if I will lose benefits or guarantees and whether I will incur any penalties and wish to transfer my ISA.
- I have not had, or asked for, personal financial advice relating to this transfer. I am responsible for my decision to transfer, If I am unsure whether this transfer is right for me, I will seek advice.

4. To My Current ISA Provider

- I authorise and instruct you to transfer all assets held in my above-named ISA directly to True Potential Investments.
- I authorise you to release all necessary information to True Potential Investments to enable the transfer of all assets held in my above-named ISA to True Potential Investments.

5. Returning This Transfer Form

Please return this form to:

True Potential Investor, Gateway West, Newburn Riverside, Newcastle Upon Tyne, NE15 8NX

Signature

Print Name

Dated

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Head Office: Gateway West, Newburn Riverside, Newcastle upon Tyne, NE15 8NX

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