



Merchant Securities

Transfer Application Form (Stocks & Shares ISA)

Title		Full Name	
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Permanent Residential Address	
	Post Code

Date of Birth							
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Do you have a National Insurance (NI) Number? Yes No If yes, please enter below

You should be able to find your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, or the DWP, or pension order book.

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I apply to transfer my existing ISA A/c No.

From (old Manager) to Merchant Securities Limited
 (Please note: a separate form will be required for each existing Manager)
 [and subscribe to this stocks and shares ISA for the tax year 20 / and each subsequent year until further notice]. *Delete the words in brackets if you will not be subscribing to this ISA.*

I declare that:

- all subscriptions made, and to be made, belong to me; *(delete if you will not be subscribing to this ISA)*
- I am 18 years of age or over;
- I have not subscribed and will not subscribe more than the overall subscription limit in total to a cash ISA and a stocks and shares ISA in the same tax year;
- I have not subscribed and will not subscribe to another stocks and shares ISA in the same tax year that I subscribe to this stocks and shares ISA; *(delete if you will not be subscribing to this ISA)*, and
- I am resident and ordinarily resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Merchant Securities Limited if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties *(delete if you will not be subscribing to this ISA)*

I authorise Merchant Securities Limited:

- To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash and
- To make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA terms and conditions.

I declare that this application form has been completed to the best of my knowledge and belief.

Signed	<input type="text"/>
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Date	<input type="text"/>
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