



Royal Bank
of Scotland

Stocks and Shares ISA to Cash ISA Transfer Request

Please note – when filling out this form, please use the tab and arrow keys to move between the relevant fields. Ensure you do **not** use the return or enter keys.

Please ensure this form is signed and then sent to:
Everyday Banking, PO Box 5612, MANCHESTER, M61 0WN.

1. Customer details

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input type="checkbox"/>	<input type="text"/>
	(Please specify)					
First name	<input type="text"/>					
Middle name(s)	<input type="text"/>					
Surname	<input type="text"/>					
Address line 1	<input type="text"/>					
Address line 2	<input type="text"/>					
Address line 3	<input type="text"/>					
Address line 4	<input type="text"/>					
Postcode	<input type="text"/>	<input type="text"/>				
Royal Bank of Scotland ISA Account number	<input type="text"/>			Sort code	<input type="text"/>	
National Insurance number	<input type="text"/>			Date of birth (DD/MM/YYYY)	<input type="text"/>	

2. Transfer information

Name of current stocks and shares ISA provider	<input type="text"/>
Existing stocks and shares ISA number	<input type="text"/>

Please note:

The terms and conditions of some stocks and shares ISAs do not allow only part of an ISA to be transferred, or may place conditions on how such a transfer is undertaken. Your existing stocks and shares ISA provider may need you to give them specific information before the transfer can proceed **and you may be required to pay any outstanding fees**. Please check with your existing stocks and shares ISA provider if you are not sure about this.

Q1 – I instruct you to:

Sell all my investments and
transfer the ISA in full

OR

Undertake a partial transfer Estimated value to be transferred £ . p

Only complete Q2 to Q5 if you are requesting a partial transfer

