

iDealing.com Limited

Freepost LON13628
 London
 E1 7BR

Self-Select ISA Transfer Form

If you wish to transfer an existing ISA to iDealing, you will first need to register online for a ISA account and then complete and return this form to the Freepost address above, along with the Stocks and Shares ISA account opening documentation sent to you in the post.

Please note that in order to transfer an existing ISA, your current ISA Manager may require you to liquidate the existing holdings and transfer the resulting cash proceeds. Your ISA Manager will be able to tell whether this is the case. We are unable to accept unit trusts, or stocks and shares that are in liquidation and/or Crest ineligible.

From 6th April 2008, cash ISA's, including those accounts formerly known as 'TOISA's and 'TESSA's, can be transferred to a stocks and shares ISA. Cash ISA's, once transferred and accepted into a stocks and shares ISA, may not be transferred back to a cash ISA.

Your Details including your permanent residential address

Name	Title	Forename(s)		Surname
Address				
Address				
Address				
Town/County			Postcode	
Telephone			Date of Birth	
Are you an existing iDealing Account holder?				
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	If Yes, existing Account No.

Do you have a National Insurance (NI) Number

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	If Yes, you must enter it here

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

Instruction to Existing ISA Manager

I wish to transfer my existing ISA account to iDealing.com Limited with immediate effect.

I authorise you to;

- provide iDealing.com Limited with any information required to effect the transfer.
- act upon any instructions form iDealing.com Limited.

I authorise iDealing.Com Ltd to;

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

I declare that;

- all subscriptions made, and to be made, belong to me
- I am 18 years of age or over
- I have not subscribed and will not subscribe more that the annual allowance, as defined by the HMRC, 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
- 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 iDealing.Com Ltd if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

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	Date