

Triodos Cash ISA

Account Type

Change Request Form

Please ensure you complete both page 1 and page 2 of this form.

Complete this application form if you want to change your existing Triodos Cash ISA to another type of Triodos Cash ISA

Please tick a box below to indicate which change you wish to make.

existing Triodos Cash ISA to Triodos 33 Day Notice Online Cash ISA

existing Triodos Cash ISA to Triodos 90 Day Notice Online Cash ISA

existing Triodos 33 Day Notice Online Cash ISA to Triodos 90 Day Notice Online Cash ISA

existing Triodos 90 Day Notice Online Cash ISA to Triodos 33 Day Notice Online Cash ISA

Section 1: Your details

Full name

Full permanent residential address including postcode

Postcode

Date of birth (DD/MM/YYYY)

Do you have a National Insurance number?

Yes No

If yes, please enter it here

Your Triodos Cash ISA account number

(the account you wish to change)

Email*

(*if you are happy to be contacted by email in the future)

Telephone security password

To help us identify you if you call, please provide us with a telephone security password if you don't already have one

(No more than 20 characters)

Please remember your telephone security password, as you will need to use it each time you call us for information about your account.

Section 2: Nominated account

If you already manage your existing Cash ISA online do not fill in this section and go straight to Section 3.

If you want to transfer money from your Online Cash ISA using internet banking, you must do so either to one of your existing Triodos accounts or to a nominated account. This account must be a personal account in your name. Please fill in your nominated account details:

Bank name and address

Account holder's name (max 18 characters)

Sort code (6 digits)

Account number (8 digits)

Section 3: Terms and conditions and key features

Before signing this application form please ensure you have read our personal banking [Terms and Conditions](#) for Personal savings accounts and the Key Features which apply to the ISA type you're changing to.

[Key Features](#) for the Triodos 33 Day Notice Online Cash ISA

[Key Features](#) for the Triodos 90 Day Notice Online Cash ISA

Section 4: Application and Declaration

I apply to subscribe to this cash ISA for the tax year 2012/2013 and each subsequent year until further notice.
(delete the above sentence if you will not be subscribing to this ISA)

I declare that:

- all subscriptions made, and to be made, belong to me;
- I am 16 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 more than the cash ISA subscription limit to one cash ISA;
- I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash 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 Triodos Bank 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.

Please continue to complete and sign Application and Declaration

I authorise Triodos Bank

- to hold my cash subscription, ISA investments, interest, dividends 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
- to make any enquiries that you may consider necessary to confirm the details on this form.

I agree to the ISA terms and conditions and Triodos Bank's General Terms and Conditions in force from time to time. I acknowledge your right to suspend operations on this account until satisfactory details about my identification have been supplied. I declare that this application form has been completed to the best of my knowledge and belief.

Signature

Date

D	D	,	M	M	,	Y	Y	Y	Y
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Please return your completed form (no stamp required) to:

Freepost TRIODOS BANK

Freephone: 0800 328 2181
contact@triodos.co.uk
www.triodos.co.uk

Calls to and from Triodos Bank may be recorded for training and monitoring purposes.

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