

# Triodos Bank.

## Cash ISA

### account type

### change request form.

#### Important Information

This form enables you to change an existing Triodos cash ISA to a different type of Triodos cash ISA, whilst keeping the same account number.

It should be completed either by printing a blank copy and filling in the required fields, or by filling in the fields online and then printing the form.

The declaration at the end of this form must be signed and dated by the account holder and then the completed form should be returned to us at our Freepost address.

Our Freepost address is Royal Mail registered and simple to use. Write it exactly as shown below on your envelope and your letter will get to us free of charge (no stamp required):

Freepost TRIODOS BANK

## Section 1: Cash ISA change details

Your Triodos cash ISA account number (the account you wish to change)

What type of Triodos cash ISA do you want to change it to? This can't be the same type as the cash ISA above.

Triodos Cash ISA

Triodos Online Cash ISA

Please check our website for availability of these products.

## Section 2: Your details

Full name (including title)

Permanent residential address

Postcode

Date of birth

/ /

Do you have a National Insurance Number?

Yes No

If yes, please enter it here

Email\*

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

## Section 3: Nominated account

If you have already provided us with a valid nominated account for your existing cash ISA do not fill in this section and go straight to Section 4.

If you want to transfer money out of your cash ISA using internet banking, you must do so to another Triodos account or a nominated account. The nominated account can be a Triodos account or a sterling account held with another UK bank or building society. Please fill in your nominated account details:

Bank name and address

Postcode

Account holder's name (max 18 characters)

Sort code

Account number

## Section 4: Application and declaration

I apply to subscribe to this cash ISA for the tax year 2020/2021 and each subsequent year until further notice.

#### 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 any combination of permitted ISAs in the same tax year;
- I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash ISA;
- I am 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 or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

#### 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 apply to change my Triodos cash ISA as indicated above.

I confirm that I have read and accepted the Triodos cash ISA Terms and Conditions and Triodos Bank's General Terms and Conditions.

I confirm that I have read the relevant Summary Box and the Depositor Information Sheet.

**Please continue and sign on the next page**

I acknowledge your right to delay changing my account and to suspend operations 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 and I will undertake to notify you without delay should any of the details change.

Signed

Date

/ /

Our Freepost address is Royal Mail registered and simple to use, write it exactly as shown below on your envelope and your letter will get to us free of charge (no stamp required):

Freepost TRIODOS BANK

Telephone: 0330 355 0355  
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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