

Triodos Bank.

ISA transfer authority form from another provider to a Triodos Stocks and Shares ISA.

You must complete this form to transfer a cash, stocks and shares, Innovative Finance or Lifetime ISA that you already hold with another provider into a Triodos Stocks and Shares ISA.

Transfers from a cash ISA usually take place within 15 business days of the transfer instruction being received by us.

Transfers from other types of ISA can take up to 30 days from the request being received by us. These types of ISA transfer take longer as the investments must be sold first, before the cash can be transferred to your Triodos Stocks and Shares ISA Cash Account.

If you wish to transfer more than one ISA please complete a separate authority form for each ISA. Additional transfer authority forms can be downloaded from our website.

This form 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 and signing the form.

If you are filling in this form by hand, please use BLOCK CAPITALS.

If the details you provide as part of this application are different to the details we currently hold then we may change your existing record. You may be contacted to verify this change or to request further confirmation.

Transfers are subject to acceptance.

When we receive this completed form, we will contact your current ISA provider to arrange the transfer and write to tell you when it has been completed.

Section 1: Your details

Title Mr / Mrs / Ms / Miss / Mx / Dr / Other

First name(s)

(please use your full name and not a nickname)

Surname

Date of birth

/ /

Do you have a National Insurance Number?

Yes No

If yes, please enter your National Insurance Number here

Permanent residential address

Postcode

Telephone (home*)

Mobile*

Email*

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

Section 2: Information about the ISA you wish to transfer to a Triodos Stocks and Shares ISA

The minimum initial investment per fund and share class is £250.

The minimum lump sum investment per fund and share class is £250.

Which type of ISA do you want to transfer from?

Stocks and Shares ISA

Cash ISA

Innovative Finance ISA

Lifetime ISA

Please note that Triodos Bank UK can only accept cash transfers. By signing this form, you are authorising your current provider to sell the holdings that you wish to transfer.

Details of the ISA you are transferring from

Account number

Sort code

— —

Reference number (if applicable)

From (name of your current ISA provider)

Have you subscribed to the ISA that you are transferring to Triodos Bank in the current tax year?

Yes No

How much of your ISA do you want to transfer?

entire ISA

current tax year's ISA subscriptions in whole or part
If part, how much would you like to transfer?

previous tax years' ISA subscriptions in whole or part
If part, how much would you like to transfer?

If you are transferring part of a stocks and shares ISA, and your subscriptions are invested in more than one share class, please specify the name of the share class(es) from which you would like to sell the shares.

Where an existing cash ISA that you wish to transfer to Triodos Bank has a notice period for withdrawals or closure, you must give consent to either option (i) or (ii) below (please tick one box)

- Section 3. Triodos Stocks and Shares
ISA you wish to transfer into

Once the transfer is complete, your money will be paid into your Cash Account and you will then be able to buy shares in Internet Banking and/or the Triodos Mobile Banking App.

Section 4: Application and declaration
(please read & sign)

I authorise my existing ISA Manager (as specified on this form) to transfer the ISA (account number above) to Triodos Bank UK Ltd. I authorise my existing ISA Manager to provide Triodos Bank UK Ltd. with any information, written or non-written, concerning the Stocks and Shares, Cash, Innovative Finance or Lifetime ISA and to accept any instructions from them relating to the ISA being transferred. I authorise Triodos Bank UK Ltd. to share the information on this form with my current ISA Manager.

Large print, braille and audio versions available on request

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Triodos Bank

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 and 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 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.

/ /

Your checklist

Triodos Bank
Deanery Road
Bristol, BS1 5AS