

# Triodos Bank.

## Transfer authority form between existing Triodos ISAs.

You can use this form to transfer balances and subscriptions from a Triodos cash ISA, Triodos Ethical Stocks and Shares ISA or cash held in a Triodos Innovative Finance ISA to an existing or recently applied for Triodos cash ISA or Stocks and Shares ISA.

If you want to transfer a Triodos cash ISA or Triodos Stocks and Shares ISA to a Triodos Innovative Finance ISA, go to **[www.triodoscrowdfunding.co.uk](http://www.triodoscrowdfunding.co.uk)** for details of how to do this.

If you wish to transfer more than one existing Triodos ISA please complete a separate authority form for each ISA.

If you are unsure as to whether or not selling assets in a stocks and shares ISA or innovative finance ISA (known as liquidating) is right for you, please seek independent financial advice. If you don't have an independent financial advisor, you can get details of local financial advisors by visiting **[www.unbiased.co.uk](http://www.unbiased.co.uk)**.

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**.

Please make sure that you complete all sections of this form.

Transfers subject to acceptance. When we receive this completed form, we will proceed with your transfer and write to tell you when it has been completed.

If you have any questions please call us on 0330 355 0355.

## Section 1: Applicant details

Full name (including title)

Date of birth

/ /

National Insurance Number

Permanent residential address

Postcode

Telephone (home\*)

Telephone (work\*)

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

Which type of ISA do you want to transfer from?

Triodos cash ISA – **complete section a**

Triodos Stocks and Shares ISA – **complete section b**

Triodos Innovative Finance ISA – **complete section c**

### Section a. The Triodos cash ISA you are transferring FROM

Account number

Have you subscribed to the cash ISA that you are transferring from in the current tax year?

Yes No

How much of your Triodos cash ISA do you want to transfer?

entire ISA

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

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

If whole, the account will be closed.

**A Triodos Fixed Rate ISA can only be transferred in its entirety and then it will be closed. Partial transfers are not allowed.**

#### Notice period and charges

Fixed Rate ISA

A full transfer out of a Fixed Rate ISA is subject to a charge equivalent to:

2 year term – 180 days' interest

3 year term – 270 days' interest

The charge will be taken from the account balance, so you might transfer less than originally deposited.

Other Triodos cash ISAs

Where your Triodos cash ISA has a notice period for withdrawals or closure, you must give consent to either option (a) or (b) below (please tick one box)

a. serve the full notice period of days/months before processing this instruction

b. proceed immediately with the transfer (note that we will waive the early access charge in this instance)

### Section b. The Triodos Stocks and Shares ISA you are transferring FROM

Stocks & Shares ISA Cash Account number

Have you subscribed to the Triodos Stocks and Shares ISA that you are transferring from in the current tax year?

Yes No

How much of your Triodos Stocks and Shares ISA do you want to transfer?

☐ entire ISA

☐ current tax year's ISA subscription 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?

We can only transfer cash proceeds after your shares have been sold. If your subscriptions are invested in more than one of the Triodos Impact Investment Fund share classes, please specify the share class(es) from which you would like to sell the shares.

Please note, in order to process the instruction, we will need to sell all shares in any fund where the stated value of shares to be sold is over 90% of the fund value.

Fund options	Values of shares to be sold	
	Distribution shares	Capitalisation shares
Triodos Global Equities Impact Fund	£	£
Triodos Pioneer Impact Fund	£	£
Triodos Future Generations Fund	£	£
Triodos Sterling Bond Impact Fund	£	£

**Section c. The Triodos Innovative Finance ISA you are transferring FROM**

Email address you use to log into your Triodos Crowdfunding account

Have you subscribed to the Triodos Innovative Finance ISA that you are transferring from in the current tax year?

☐ Yes ☐ No

How much of your Triodos Innovative Finance ISA do you want to transfer?

☐ entire ISA

☐ current tax year's ISA subscription 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?

Please note: Only cash proceeds can be transferred from an IFISA. We are unable to arrange the sale of investments held in an IFISA so you must arrange the sale and ensure the cash proceeds are available to enact this transfer before you complete this form.

**Section 3: Triodos ISA you wish to transfer into**

Triodos Cash ISA Account number

Or

Triodos Stocks and Shares ISA Cash Account Number

Or

If you have recently applied for a new Triodos ISA and don't yet have the account number please tell us which ISA you have applied for

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

I apply to transfer my existing Triodos ISA.

If transferring funds from a Triodos cash ISA to a Triodos Stocks and Shares ISA, I confirm that I have read and understood in full the information contained in the Supplementary Information Document, the Impact Investment Funds and Stocks and Shares ISA Terms and Conditions.

I acknowledge your right to suspend operations on this account until satisfactory details about my identification have been supplied. I declare that this transfer authority 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.

Signature

Date

/ /

**Your checklist**

Please check you have completed sections 1-4.

Send the completed transfer authority form to:

Freepost TRIODOS BANK

Our freepost address is Royal Mail registered and simple to use - write it on your envelope exactly as shown above (no stamp required) and your letter will get to us free of charge by second class mail.

Alternatively, for first class mail, you can post your form to us using the below address:

Triodos Bank  
Deanery Road  
Bristol  
BS1 5 AS

Telephone: 0330 355 0355  
[www.triodos.co.uk](http://www.triodos.co.uk)

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

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**Triodos @ Bank**

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