



# STOCKS AND SHARES ISA TRANSFER FORM

For transfer of a Cash or Stocks & Shares ISA from another provider into your IG Stocks & Shares ISA.

**Before sending this form to IG, please make sure:**

- You have opened an IG Stocks and Shares ISA account
- You have completed a W8-BEN form if transferring US securities

IG Share Dealing Account Number: \_\_\_\_\_ IG Stocks & Shares ISA Account Number: \_\_\_\_\_

## PERSONAL DETAILS

**Account Holder's Details**

Surname: \_\_\_\_\_

Forenames: \_\_\_\_\_

Title (Mr/Mrs/Ms/Other): \_\_\_\_\_

Date of birth: \_\_\_\_\_

Permanent residential address: \_\_\_\_\_

Postcode: \_\_\_\_\_

Country of residence: \_\_\_\_\_

National Insurance Number:

I don't have an NI Number

## DECLARATION

I have read and agree to be bound by the IG Share Dealing Customer Agreement and the ISA Supplementary Terms and that this ISA Transfer Form has been completed as to the best of my knowledge. I confirm that this transfer constitutes no change in beneficial owner and acknowledge that no dealing instructions can be placed on these assets until they are lodged in my IG Stocks & Shares ISA. I have not, and will not, subscribe more than the total subscription allowance for Cash and Stocks & Shares ISAs in the same tax year. I declare that I am 18 years of age or over.

## TRANSFER AUTHORITY

Current provider's name: \_\_\_\_\_

Current provider's address: \_\_\_\_\_

Current provider's telephone no.: \_\_\_\_\_

ISA Account reference no.: \_\_\_\_\_

Postcode: \_\_\_\_\_

Approximate value: £ \_\_\_\_\_

## DETAILS OF TRANSFER TO IG MARKETS LIMITED

**TRANSFERRING A STOCKS & SHARES ISA**

- Current Tax Year Stocks & Shares ISA
- Previous Tax Year(s) Stocks & Shares ISA

Please transfer as:  Stock (this will include any residual cash)

**TRANSFERRING A CASH ISA**

- Current Tax Year Cash ISA
- Previous Tax Year(s) Cash ISA

Cash (if Cash, liquidate assets prior to transfer)

Please supply IG Markets Limited with any information they require about my assets including transaction, dividend and subscription histories and complete the transfer as detailed above. This form is only for transfer of assets held within a Stocks & Shares ISA or Cash ISA. For full transfer instructions please contact IG at: Corporate Actions, IG Markets Limited, Cannon Bridge House, 25 Dowgate Hill, London EC4R 2YA or call on 0207 573 0056.

I have read and agreed to the declaration above.

 Signature: \_\_\_\_\_ Date: \_\_\_\_\_



Once you have completed your details, please:

- Print the form, ensuring nothing is printed on the back
- Sign it
- Return it by post to the address opposite