

# Corporate Vantage Stocks & Shares ISA Transfer Form

Application to transfer existing Stocks & Shares ISAs or Cash ISAs to the HL Corporate Vantage Stocks & Shares ISA

## 1 PERSONAL DETAILS

Title (Mr, Mrs etc)	Full Forenames	Surname	
Permanent Residential Address			
Postcode	Employer	Daytime Tel. No	Date of Birth / / 19
Email Address (if applicable)	National Insurance No		If you have no NI No. tick here

## 2 PAPERLESS REPORTING SERVICE

☒ Please tick this box if you would like to receive your statements, contract notes and other account information electronically rather than by post.  
If you have not yet registered for online access we will send you further details about registering when you apply.

## 3 INCOME INSTRUCTIONS

Please complete this section if this is your first application for, or if you would like to change the current income instruction on, the HL Corporate Vantage Stocks & Shares ISA.

<b>A</b> Reinvested automatically <input checked="" type="checkbox"/>	<b>Choose option A OR B</b>	<b>B</b> Paid out to my bank <input checked="" type="checkbox"/>	Name of Account Holder	Sort Code - -
If you have ticked this box do not complete section B.		Roll Number or Building Soc.Ref.	Account Number	

## 4 SIGNATURE & DECLARATION - I agree to the declaration below

<b>X</b>	PLEASE SIGN HERE	Date
<p>I have read, agreed to and retained the Terms &amp; Conditions, the Important Investment Notes, and Key Features of the Vantage ISA. Where I am investing in a fund or an ETF, I am doing so on the basis of the information contained in the Key Features, Simplified Prospectus or Key Investor Information Document provided to me on paper, CD-ROM or via <a href="http://www.hl.co.uk">www.hl.co.uk</a> (or my Plan's website, if applicable).</p> <p>The declaration and the information I will give in my application is correct to the best of my knowledge and belief and shall be the basis of the contract between me and Hargreaves Lansdown. I will notify Hargreaves Lansdown without delay of changes to these particulars. I have not received, and will not receive, advice from Hargreaves Lansdown.</p> <p>I authorise Hargreaves Lansdown: (a) To hold my cash subscriptions, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash. (b) To make on my behalf any claims to relief from tax in respect of ISA investments. I have not subscribed, and will not subscribe more than the overall subscription limit in total to a Stocks &amp; Shares ISA and a Cash ISA in the same tax year. I declare that I am 18 years of age or over.</p> <p><b>Cash ISA only:</b> I understand that the Cash ISA I am transferring will be transferred into a Stocks &amp; Shares ISA.</p>		

## 5 ISA TRANSFER AUTHORITIES - Please complete one authority for each ISA you wish to transfer

<b>A</b> ISA Provider's Name	Provider's Postcode
ISA Reference to be transferred	Approx. Transfer Value
Please take this authority to transfer my entire (please tick one only):	
<b>STOCKS &amp; SHARES ISA</b> <input checked="" type="checkbox"/>	<b>OR CASH ISA</b> <input checked="" type="checkbox"/>
Please transfer my Stocks & Shares ISA as:	Please transfer my Cash ISA with the sort code (if applicable) to the HL Corporate Vantage Stocks & Shares ISA
Stock <input checked="" type="checkbox"/> OR Cash <input checked="" type="checkbox"/>	
I authorise you to discuss this transfer with Hargreaves Lansdown by telephone.	
<b>X</b>	PLEASE SIGN HERE
Full Name (Block capitals)	Date
Postcode	
Regular Savings - Cease collection of my monthly savings plan with immediate effect if I have chosen to transfer my ISA for the current tax year.	

Please only complete this section if you are transferring your ISA as cash to the HL Corporate Vantage Stocks & Shares ISA.

Please reinvest the cash transfer proceeds as follows:

OWN CHOICE	%
OWN CHOICE	%
OWN CHOICE	%
OWN CHOICE	%
CASH - to be held pending investment instructions	%
<b>TOTAL</b>	<b>100 %</b>

<b>B</b> ISA Provider's Name	Provider's Postcode
ISA Reference to be transferred	Approx. Transfer Value
Please take this authority to transfer my entire (please tick one only):	
<b>STOCKS &amp; SHARES ISA</b> <input checked="" type="checkbox"/>	<b>OR CASH ISA</b> <input checked="" type="checkbox"/>
Please transfer my Stocks & Shares ISA as:	Please transfer my Cash ISA with the sort code (if applicable) to the HL Corporate Vantage Stocks & Shares ISA
Stock <input checked="" type="checkbox"/> OR Cash <input checked="" type="checkbox"/>	
I authorise you to discuss this transfer with Hargreaves Lansdown by telephone.	
<b>X</b>	PLEASE SIGN HERE
Full Name (Block capitals)	Date
Postcode	
Regular Savings - Cease collection of my monthly savings plan with immediate effect if I have chosen to transfer my ISA for the current tax year.	

Please only complete this section if you are transferring your ISA as cash to the HL Corporate Vantage Stocks & Shares ISA.

Please reinvest the cash transfer proceeds as follows:

OWN CHOICE	%
OWN CHOICE	%
OWN CHOICE	%
OWN CHOICE	%
CASH - to be held pending investment instructions	%
<b>TOTAL</b>	<b>100 %</b>

Please photocopy, visit your Plan's website or call 0117 314 1795 for further copies