

## Internal ISA transfer form

Full name	
Permanent residential address	
Postcode	
Date of birth	
National Insurance (NI) number	
You should be able to find your NI number on a payslip, P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP, or pension order book.	
I apply to transfer my existing Cash ISA:	Account number
to Cash ISA:	Account number

**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/made a payment to and will not subscribe/make a payment more than the overall subscription limit in total to any combination of permitted ISA types 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, and
- 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 the 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 civil partnership with, a person who performs such duties. I will inform Principality 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 Principality Building Society to:**

- \* Hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; and
- \* Make on my behalf any claims to relief from tax in respect of ISA investments

**I agree to the Account Terms and General Terms for this ISA**

I declare that this application form has been completed to the best of my knowledge and belief

Signed..... Date.....



**CALL US**  
0330 333 4000\*



**ONLINE**  
principality.co.uk



**BRANCH**  
Pop in to see us

\* To help us maintain our service and security standards, telephone calls may be monitored and recorded.

Principality Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, reference number 155998. Principality Building Society, Principality Buildings, Queen Street, Cardiff, CF10 1UA. principality.co.uk