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Cash ISA to HSBC Fixed Rate Cash ISA Transfer Authority

This form is for **cash** ISA transfers ONLY, you will have been sent a different form if you have requested to transfer a stocks & shares ISA.

Before you start

- If completing by hand, use black ink, BLOCK CAPITALS and initial any alterations.
- You must already have an HSBC Fixed Rate Cash ISA.
- We must receive this form within 30 days of your HSBC Fixed Rate Cash ISA account being opened.
- Please ensure you have signed and dated the form.
- If more than one cash ISA is being transferred, please complete a separate form for each one.
- If you need any further assistance with the completion of this form, please chat with us 24/7 via Online Banking or the HSBC UK Mobile Banking App (subject to maintenance periods). You can also call us or pop into a branch.
- Please hand this completed form into a branch or post to: Customer Service Centre, BX8 1HB.
- For more detail on how we will use your personal information, please see our Privacy Notice at [hsbc.co.uk/privacy-notice](https://www.hsbc.co.uk/privacy-notice). You can also ask for a copy in branch.

1. Your personal details (all customers complete)

Please ensure that your personal details held with your current provider match what is included on this form. If details do not match, your transfer may be delayed.

Surname	<input type="text"/>								
Forename(s)	<input type="text"/>								
Date of birth	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Permanent residential address	<input type="text"/>								
	<input type="text"/>								
	<input type="text"/>								
	Postcode <input type="text"/>								

Do you have a National Insurance Number? **If you only have a temporary National Insurance Number, please tick 'No'.**

Yes No If 'Yes', please enter it

- You should be able to find your National Insurance Number on a payslip, P45 or P60, a letter from HM Revenue and Customs or a letter from DWP.

2. Transfer Authority Form (all customers complete)

Details about the cash ISA you want to transfer.

Name of the existing
ISA provider e.g. bank
or building society

Existing cash ISA details

Branch Sort code

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Bank/Building Society
Account number

Roll number (for
Building Society
accounts only)

Please note: As well as being subject to the terms and conditions of the HSBC Fixed Rate Cash ISA receiving the transfer proceeds, the transfer will be undertaken subject to the terms and conditions applying to your existing cash ISA.

For example:

- Some ISA products do not allow only part of an ISA to be transferred.
- Your existing ISA provider may need you to give them specific information before the transfer can go ahead.
- There may be outstanding fees to pay before the transfer goes ahead.

If you are not sure what conditions apply please check with your cash ISA provider before completing this form.

Current Tax Year's Subscriptions

Do you want to transfer current tax year subscriptions to HSBC?
These are funds added to the ISA you are transferring since 6 April.

Yes No

Current tax year subscriptions must be transferred as a whole. Partial transfers of current tax year subscriptions are therefore not allowed.

If you ticked 'Yes', how much have you subscribed this tax year?

£

Previous Years' Subscriptions

Do you want to transfer previous tax years' subscriptions?

Yes No

Do you want to transfer the full amount of previous tax years' subscriptions? Yes

No

If you ticked 'No', how much do you wish to transfer?

£

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1 Centenary Square, Birmingham, B1 1HQ, United Kingdom. Authorised by the Prudential Regulation Authority
and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Our Financial
Services Register number is 765112.

Customer Information: Customer Service Centre, BX8 1HB.

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