

Stocks and Shares Transfer Request Form

ISA

FOR OFFICE USE ONLY

Agency Number

Referral Type

Vantive Lead ID

Introducer Code
(if different from above)

Campaign Code

SB Code

Branch Sort Code

Please complete in BLOCK capitals and tick boxes where appropriate.

Please return this Transfer Request Form with your completed Scottish Widows ISA Application Form to: Scottish Widows Unit Trust Managers Limited, PO Box 28015, 15 Dalkeith Road, Edinburgh EH16 5WL.

Do not send this form to your existing ISA manager. Scottish Widows will arrange for the transfer of your ISA.

Full address of your existing ISA manager:

Postcode

Reference number of your existing ISA:

Dear Sirs,

I am writing to inform you that I wish to transfer my Individual Savings Account (stocks & shares component) to:

Scottish Widows Unit Trust Managers Limited
PO Box 28015
15 Dalkeith Road
Edinburgh EH16 5WL

This transfer is in respect of (please tick one or both boxes as appropriate):

The current tax year Previous tax years

If you are transferring your ISA from a previous tax year, please state which year(s) you want to transfer.

If the transfer is for the current tax year, is it a Maxi or a Mini ISA?

Please note that transfers for the current tax year must be for the total value at the date of transfer. Transfers from previous tax years may be in whole or in part.

Please indicate the amount you wish to transfer from previous years, if less than 100% of the current fund value:

£

Please ensure that this ISA has been fully invested in accordance with the regulations of the applicable tax year(s) before the transfer is effected. I request that you accept my instructions and sell my total current holding as stated above. Please send a cheque for the proceeds, made payable to Scottish Widows Unit Trust Managers Limited, to the above address.

Yours faithfully,

Signature

Date

Full name and address

Postcode

Country of residence*

*Please ensure you complete the above if your address is outside England/Scotland/Wales and N.Ireland