

MPFS Stocks & Shares ISA Transfer Application (Form C)

Warrant/Payroll No* Rank/Grade

Applicant Surname Mr/Mrs/Ms/Miss

Forename(s)

Date of Birth Gender M F

Do you have a National Insurance Number? YES NO

If YES you must enter it here

You should be able to find your NI number on a payslip, Form P45 or P60 or a letter from HM Revenue & Customs, a letter from the DWP, or pension order book.

Station / Branch

Home Address

Postcode

Daytime Tel No Mobile

I apply to transfer my existing ISA A/c No
from (existing manager) to (us)

Name:
Address:
Tel:

Metropolitan Police Friendly Society Ltd Berwick House, 8-10 Knoll Rise, Orpington, Kent, BR6 0EL Tel: 01689-891454
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* In whole / All except current tax year / In part (please give details)

*(Delete as appropriate)

If you would also like to pay a monthly subscription, or an additional lump sum, please also complete an ordinary ISA application (Form A or B). * Partners & Family members - please give Warrant / Payroll number of your partner/relative above and state your relationship to them below. Please remember to enclose proof of identity.

How did you obtain this brochure: Website Aware

Declaration & Authorisation

I declare that

- all subscriptions made, and to be made, belong to me; (only applies if the transfer includes subscription made in the current tax year. Otherwise please delete); and
- I am 18 years of age or over; and
- I have not subscribed and will not subscribe more than £7,200 in total to a Cash ISA and a Stocks & Shares ISA in the same tax year; and
- I have not subscribed and will not subscribe to another Stocks & Shares ISA in the same tax year that I subscribe to this Stocks & Shares ISA; (only applies if the transfer includes subscriptions made in the current tax year. Otherwise please delete); and
- I am resident and ordinarily 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 a civil partnership with, a person who performs such duties. I will inform MPFS if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties (only applies if the transfer includes subscriptions made in the current tax year. Otherwise please delete).

I authorise MPFS Limited:

- to hold my cash subscriptions, any other proceeds in respect of my ISA investments and any other cash;
- to make on my behalf any claims to relief from tax in respect of ISA investments; and
- to contact my existing ISA manager to arrange this transfer.

I hereby apply to join the appropriate Table and agree to abide by the ISA terms and conditions and Rules of the Society. (A copy of the Rules and Tables is available on request.)

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

Signed Date

DATA PROTECTION ACT Any information you provide will be held by the Metropolitan Police Friendly Society to administer your contracts. We will NOT disclose such information to third parties (except those who assist us in administering your contracts) unless legally required to do so. We may from time to time use it to inform you by letter about any products and services which may be of interest to you. If you do not wish to receive such information, please tick this box.