

Lump Sum ISA (Stocks & Shares) Transfer Form

By completing this form you are requesting to transfer your ISA, currently held with another provider, to Metfriendly.

The minimum transfer into a Lump Sum ISA is £2,000 with no upper limit.

Please do not hesitate to contact our Member Services team on **01689 891454** should you have any queries or require further support.

Mr/Mrs/Ms/Miss	Surname	Forename(s)	
First line of home address		Postcode	
Date of Birth	<input type="text"/>	Gender	M <input type="checkbox"/> F <input type="checkbox"/>
National Insurance Number		<input type="text"/>	
Email Address		Preferred Contact No	
Metfriendly Membership Number		<input type="text"/>	
If applying as a serving or retired member of the Police Service, please complete:			
Constabulary		Prefix & Warrant/Payroll No	
Rank/Grade			

- ☐ We would like to email you from time to time with relevant information on financial issues relating to the Police, such as Police pay, and products and services we provide including special offers. If you would like to receive the above information **please indicate your consent by ticking the box to the left**. You will be able to unsubscribe from these communications easily and at any time.

For your own benefit and protection, you should read the **Key Information Document (KID)** associated with this product, available by request or viewable at metfriendly.org.uk. A copy will also be posted to you once your policy is set up.

I apply to transfer my existing ISA a/c no

In whole ☐ In part ☐ (please specify) Estimated value of ISA transfer **£**

(Your existing provider may have rules around the current tax year contributions so, you may wish to check with them first.)

From (existing manager) Name: Address:	To Metfriendly Central Court, Knoll Rise, Orpington, BR6 0JA Tel: 01689 891454
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Where a period of notice is required for closure/part transfer of the existing ISA I give my consent to either: (please tick as appropriate)

1. Serve the full notice period before this instruction can be processed; or ☐
2. Proceed immediately with the transfer and bear the consequential penalty that may be applied. ☐

If you want to pay other monthly or lump sum contributions, you will need to send us the appropriate application.

Please read and sign the ISA Declaration & Authorisation on page 2

ISA Declaration & Authorisation

I declare that:

- I am 18 years of age or over; **and**
- 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 authorise Metfriendly

- To hold my cash subscription, any other proceeds in respect of my ISA investments and any other cash; **and**
- 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 authorise my existing ISA Manager (as specified above)

- To transfer the ISA (account number above) to Metfriendly; **and**
- To provide Metfriendly with any information, written or non-written, concerning the existing ISA; **and**
- To accept any instructions from Metfriendly relating to the ISA being transferred.

Declaration

- I hereby apply for the Metfriendly product named at the beginning of this Application document and accept the terms and conditions as described within the product literature and elsewhere within this Application document.
- I apply for membership of Metfriendly in accordance with the provisions of its Rules (unless I am already a Member) and I agree to abide by Metfriendly's Rules at all times (a copy of Metfriendly's Rules appears on its website and is available in printed form upon request to the Secretary at the Registered Office).

Signed **APPLICANT**

Date

Promotional Code

OUR DATA PRIVACY STATEMENT We need the information you provide in order to set up the contract between you and us. We will share your data with our mailing house partners (see our privacy notice) to send you legally required documents such as your annual benefit statement and invitation to our Annual General Meeting. Your data will only be kept for such a time needed to perform these tasks. Where possible we use external information to verify your identity and to keep our records up to date on home address changes. We use a third party provider to deliver our marketing emails. We gather statistics around email opening and clicks using industry standard technologies. For more information, please see our privacy notice at metfriendly.org.uk/privacy

Contact Details

Metfriendly, Central Court, Knoll Rise, Orpington, BR6 0JA

Phone: 01689 891454 Metphone: 846690 Email: info@metfriendly.org.uk

Metfriendly is a trading name of the Metropolitan Police Friendly Society Limited.

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