

Application Form to Transfer an ISA to a Metfriendly Lifetime ISA

You will also need to complete a Metfriendly Lifetime ISA application form unless you have already done so.

Minimum transfer limit - £1200 unless you are also paying premiums into a Metfriendly Lifetime ISA.

Unless you are already a member of Metfriendly, please send us a proof of ID (copy of passport or driving licence) and address (a recent utility bill). You should sign the back of the copies to confirm that they are a true copy of the original.

Warrant/Pay no. (If applicable)	
Mr/Mrs/Ms/Miss	Surname
Forename(s)	
Date of Birth <input type="text"/> <input type="text"/> <input type="text"/>	Gender M <input type="checkbox"/> F <input type="checkbox"/>
Home Address	Postcode
Daytime Tel No	Mobile No
Preferred Email Address	
National Insurance No <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
I apply to transfer my existing ISA A/c No <input type="text"/>	
(Please tick one box only)	
In whole <input type="checkbox"/> All except current tax year <input type="checkbox"/> In part (please give details) <input type="checkbox"/>	
Is this a Help to Buy ISA? Yes <input type="checkbox"/> No <input type="checkbox"/>	
From (existing manager) Name: Address:	To Metfriendly Central Court, Knoll Rise, Orpington, BR6 0JA Tel: 01689 891454
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 <input type="checkbox"/>	
2. Proceed immediately with the transfer and bear any consequential penalty which may be applied <input type="checkbox"/>	
For your own benefit and protection, you should read the Key Features associated with this product, available by request or viewable at www.metfriendly.org.uk/lisa/keyfeatures . If you do not understand any point please ask us for further information.	
If you are/were NOT in the police service, please give the name and relationship of the partner or relative who is/was	
The following details should be given for the applicant or the applicant's partner or relative as applicable	
Rank/Grade	Warrant/Payroll No
Constabulary	

Please turn over for declaration, authorisation and signature

Declaration & Authorisation

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 submit lifetime ISA bonus claims to HMRC on my behalf; **and**
- to withhold and deduct from a balance in the lifetime ISA and to pay to HMRC any charges due on withdrawals, **and**
- to make a record in writing in accordance with Regulation 12B paragraph 7(a) of the Individual Savings Account Regulations where required to do so; **and**
- to contact my existing ISA manager to arrange this transfer

I authorise my existing ISA Manager (as specified overleaf):

- to transfer the ISA (account number overleaf) 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.

I hereby apply to join the appropriate Table. I agree to the ISA terms and conditions and agree to abide by the Rules of the Society. I declare that the information given is correct to the best of my knowledge and belief.

Signature

Date

What was the main reason you chose Metfriendly?

Past Performance Reputation Unique Product Special Promotion

Other

Promo code

Contact Details

Metfriendly, Central Court, Knoll Rise, Orpington, BR6 0JA
Phone: 01689 891454 Fax: 01689 891455 Metphone: 846690 Email: info@metfriendly.org.uk

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. Where possible we use external information to verify your identity and to keep our records up to date on rank and location changes. We may from time to time use it to inform you about other products and services that may be of interest to you including via e-mail. If you do not wish to receive such information please tick this box.

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

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.
Incorporated under the Friendly Societies Act 1992 and registered in the UK No. 496F