

Monthly Savings ISA (Stocks & Shares) Transfer Form



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

The minimum transfer into a Monthly Savings ISA is £500, 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/Other	Surname	Forename(s)
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First line of home address

It is not possible to accept a care of address for ISAs

Postcode	Date of Birth	National Insurance Number
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National Insurance Number If you have your National Insurance (NI) number please enter it in the boxes above.

You can find your NI number online in your HMRC account or App, in any documents you already have, for example a payslip, P45 or P60, or at gov.uk/find-national-insurance-number You must provide a National Insurance number to apply for an ISA unless you are not eligible for one. You can check if you're eligible and apply online at gov.uk/apply-national-insurance-number

Are you eligible for an NI number? Put an 'X' in one box

Yes ☐ If Yes, you must apply for an NI number and provide it before you complete your ISA application. See address above. No ☐

Personal Email	Mobile No
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Metfriendly Membership Number

*For your own benefit and protection, you should read the **Key Information Document** and **product particulars** relating to this plan. A copy of this will be available during meetings with our representatives or on the product page of the website when selecting this product online. In addition, a copy will also be sent to you once your Monthly Savings ISA is set up. If you do not understand any of the points, please ask for further information.

We would like to contact 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. You will be able to unsubscribe from these communications easily and at any time.

Please provide me with the above information by

☐ SMS ☐ Email ☐ Post ☐ Phone ☐ None

I apply to transfer my existing ISA a/c no

In whole	<input type="checkbox"/> for the tax year(s)	please specify	£	Estimated value of ISA transfer	£
In part	<input type="checkbox"/> for the tax year(s)	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 MPFS 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.

ISA Declaration & Authorisation

I authorise MPFS

- 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 MPFS.
- To provide MPFS with any information, written or non-written, concerning the existing ISA.
- To accept any instructions from MPFS relating to the ISA being transferred.

Declaration

- I agree to the ISA terms and conditions. I declare that the information given is correct to the best of my knowledge and belief.

Signed **APPLICANT**

Date

Promotional Code **IF APPLICABLE**

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 open rates and clicks using industry standard technologies. For more information, please see our privacy notice at mpfs.org.uk/privacy

Contact Details

MPFS, Central Court, Knoll Rise, Orpington, BR6 0JA
Phone: 01689 891454 Email: info@mpfs.org.uk

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