

Lump Sum ISA (Stocks & Shares)

Transfer Application Form

Minimum transfer limit - £1500

If you are new to us then please remember to include proof of identity and address.

Warrant/Pay no. (If applicable)	
Mr/Mrs/Ms/Miss	Surname
Forename(s)	
Date of Birth	Gender <input type="checkbox"/> M <input type="checkbox"/> F
Home Address	
	Postcode
Daytime Tel No	Mobile No
Preferred Email Address	
National Insurance No	
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"/>	
From (existing manager)	To
Name:	Metfriendly, Central Court, Knoll Rise, Orpington, BR6 0JA
Address:	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
2. Proceed immediately with the transfer and bear any consequential penalty which may be applied.

If you would also like to pay a monthly ISA please also complete an ordinary ISA application.

I confirm I have read the Key Features associated with this product, available by request or viewable at www.metfriendly.org.uk/lumpsumisa/keyfeatures

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	

Declaration & Authorisation

I declare that:

- I am 18 years of age or over; and
- I have not subscribed, and will not subscribe, more than the overall subscription limit in total to a Cash ISA and a Stocks & Shares ISA 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 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
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What was the main reason you chose Metfriendly?

Past Performance Reputation Unique Product Special Promotion

Other	Promo code
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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 or e-mail 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.

When completed this form should be returned to: Metropolitan Police Friendly Society Limited

Central Court, Knoll Rise, Orpington, BR6 0JA

Despatch: MPFS Orpington

metfriendly
save, invest and protect