

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		National Insurance Number
Email Address		Preferred Contact No
Metfriendly Membership Number		
If applying as a serving or retired member of the Police Service, please complete:		
Constabulary		Prefix & Warrant/Payroll No
Rank/Grade		

Here at Metfriendly we take your privacy seriously. We will use your email address to confirm your application. In addition, we will from time to time provide you with relevant information on financial issues relating to the Police, and the products and services we provide including special offers by post. We will not contact you by phone for marketing purposes. If you prefer not to receive this information by post, you can email us at any time to unsubscribe (enquiries@mpfs.org.uk).

If you would prefer to receive relevant information on financial issues and our products and services relating to the Police by email or text message, please indicate your consent by ticking the box. You can email us at any time to unsubscribe (enquiries@mpfs.org.uk).

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

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, unless you have an existing ISA with Metfriendly.

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.
- 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.
- to make on my behalf any claims to relief from tax in respect of ISA investments.
- 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.
- to provide Metfriendly with any information, written or non-written, concerning the existing ISA.
- 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 confirm I have also read the Key Information 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 the website and is available on request).

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 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 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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