



NatWest

Stocks and Shares ISA to Cash ISA Transfer Request

Please note – when filling out this form, please use the tab and arrow keys to move between the relevant fields. Ensure you do **not** use the return or enter keys. Please complete this form in BLOCK CAPITALS and mark option boxes with an 'X'.

Please ensure this form is signed and then sent to:
Everyday Banking, PO Box 5612, MANCHESTER, M61 0WN.

1. Customer details

Title Mr Mrs Miss Ms Other (Please specify)

First name

Middle name(s)

Surname

Address line 1

Address line 2

Address line 3

Address line 4

Postcode

NatWest cash ISA number Sort code

National Insurance number Date of birth (DD/MM/YYYY)

2. Transfer information

Name of current stocks and shares ISA provider

Existing stocks and shares ISA number

Please note:

The terms and conditions of some stocks and shares ISAs do not allow only part of an ISA to be transferred, or may place conditions on how such a transfer is undertaken. Your existing stocks and shares ISA provider may need you to give them specific information before the transfer can proceed **and you may be required to pay any outstanding fees**. Please check with your existing stocks and shares ISA provider if you are not sure about this.

Q1 – I instruct you to:

Sell all my investments and transfer the ISA in full

OR

Undertake a partial transfer Estimated value to be transferred £ . p

Only complete Q2 to Q5 if you are requesting a partial transfer

