ISA Transfer Form

Date:

MM

YYYY

DD

bordier | ¹⁸⁴⁴

ISA transfer instruction	ISA transfer instruction
Name of current plan manager:	Name of current plan manager:
Address of current plan manager:	Address of current plan manager:
Current plan numbers of ISAs being transferred:	Current plan numbers of ISAs being transferred:
Plan holder's name:	Plan holder's name:
Plan holder's address:	Plan holder's address:
National insurance number:	National insurance number:
Tax Identity Number (TIN) / Unique Tax Payer Reference (UTR):	Tax Identity Number (TIN) / Unique Tax Payer Reference (UTR):
Date of birth:	Date of birth:
Tax years to be transferred:	Tax years to be transferred:
Please transfer my ISA to Bordier & Cie (UK) PLC, 23 King	Please transfer my ISA to Bordier & Cie (UK) PLC, 23 King
Street, St James's, London SW1Y 6QY by transferring the	Street, St James's, London SW1Y 6QY by transferring the
investments and/or cash in my ISA to Bordier & Cie (UK) PLC in accordance with their instructions. I authorise you	investments and/or cash in my ISA to Bordier & Cie (UK) PLC in accordance with their instructions. I authorise you
to provide Bordier & Cie (UK) PLC with any information they request regarding my ISA. The plan will be held under	to provide Bordier & Cie (UK) PLC with any information they request regarding my ISA. The plan will be held under
Bordier & Cie (UK) PLC's Inland Revenue number Z1363, Fulham Tax reference 281 1112.	Bordier & Cie (UK) PLC's Inland Revenue number Z1363, Fulham Tax reference 281 1112.
Signature:	Signature:

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Date:

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