

ISA transfer instruction

Name of current plan manager:

Address of current plan manager:

Current plan numbers of ISAs being transferred:

Plan holder's name:

Plan holder's address:

National insurance number:

Tax Identity Number (TIN) / Unique Tax Payer Reference (UTR):

Date of birth:
DD MM YYYY

Tax years to be transferred:

Please transfer my ISA to Bordier & Cie (UK) PLC, 23 King 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 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.

Signature:

Date:
DD MM YYYY

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