

ISA Transfer Authority

Office Use Only	
WCIM A/C NO:	

Please complete this form using **BLOCK CAPITALS** and return to **Walker Crips Investment Management, ISA Transfers, St James House, 27-43 Eastern Road, Romford Essex, RM1 3NH.**

To: (Your existing Plan Manager)	
Manager's Address:	Postcode:
Telephone Number:	
Stocks and Shares ISA Ref. No(s):	
Cash ISA Ref. No(s): (Transfer to Stocks and Shares)	
Your National Insurance No:	
Your Date of Birth:	
The Transfer to be in the form of: (Please tick the appropriate box)	<input type="checkbox"/> Re-register shares with any cash balance <input type="checkbox"/> Transfer my cash ISA in full <input type="checkbox"/> Sell the shares and transfer the whole ISA as cash <input type="checkbox"/> Transfer part of my ISA (as detailed below): <div style="border: 1px solid black; height: 20px; width: 100%; margin-top: 5px;"></div>

I hereby authorise you to transfer forthwith the above Plan(s) to Walker Crips Investment Management Limited, a Her Majesty's Revenue and Customs (HMRC) approved Plan Manager, and I authorise you to provide Walker Crips Investment Management Limited with all such relevant information relating to my Plan(s) as may be required.

Name:	
Address:	Postcode:
Date (dd/mm/yy):	
Signature:	