



INTERNAL CASH ISA TRANSFER REQUEST FORM

For transferring your Progressive Cash ISA to another Progressive Cash ISA product.

PERSONAL DETAILS

Name

Permanent residential address
Postcode

Date of birth National Insurance Number
(if you have one)

Daytime tel.no. Mobile no.

*If you're opening a new Cash ISA with us, you must complete a **Cash ISA application form** as well as this transfer request. Valid photographic identification will also be required.*

INFORMATION ABOUT THE CASH ISA YOU WANT TO TRANSFER

Progressive Cash ISA Account no.

TRANSFER INSTRUCTIONS

1. Do you wish to close your current Cash ISA and transfer the full amount? Yes No

2. Have you subscribed to this Cash ISA in this current tax year? Yes No

If **Yes**, please enter the amount paid in this tax year £

3. If you answered **No** to **Question 1** please enter the total amount you want to transfer £

Do you want to transfer current tax year subscriptions in Q2 above as part of this transfer? Yes No

Please note that the amount in your account representing current tax year subscriptions can only be transferred in whole and not part.

TRANSFER AUTHORITY AND SIGNATURE

Please accept this as my authority to transfer my Progressive Cash ISA (account number above) to:-

• Existing Progressive Cash ISA Account No.

• **or**, New Cash ISA New Cash ISA Account Type

Signature:

Date:

DATA PROTECTION

Progressive Building Society is committed to keeping your information secure and private. Both physical and electronic measures have been put in place to keep your data safe. We collect and store information from you to help manage your accounts and to provide a service to you.

The Society will rely on the following legal basis for processing your personal data. The processing is necessary for:

- the performance of a contract with you or to take steps to enter into a contract;
- compliance with a legal obligation;
- the purposes of legitimate interests pursued by us or a third party.

An information leaflet is available from Progressive Building Society on request or may be viewed online at the Society's website theprogressive.com. We would like to send you information about products and services which we feel may be of interest to you by post, telephone, email and SMS. This may be through a third party acting on our behalf. If you agree to being contacted in this way tick the relevant boxes:

Post	Telephone	Email	SMS
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

You can withdraw this consent at any time by contacting your branch.

FOR BRANCH USE ONLY

Branch/Agent

**Head Office, Progressive House, 33/37 Wellington Place,
Belfast BT1 6HH Tel: (028) 9024 4926 Fax: (028) 9033 0431**

Branches & Agents across Northern Ireland

theprogressive.com