INTERNAL CASH ISA TRANSFER REQUEST FORM



If you are transferring your existing Progressive Cash ISA to a new Cash ISA with the Society and you have built up previous years flexible allowance in your existing account, you will lose that allowance when you transfer your account. If you wish to use the flexible allowance you should re-deposit into your existing Cash ISA before you complete your transfer.

To transfer your existing Progressive Cash ISA to another Progressive Cash ISA, please:

- Complete this Internal Cash ISA Transfer Request Form.
- If you are opening a new Cash ISA to transfer funds into, you **must** also complete a Cash ISA Application Form.

1. PERSONAL DETAILS

Signature:

Name			
Full permanent residential addre	SS		
	Postcode		
Date of birth	National insurance number]	
Daytime tel.no.	Mobile no.		
2. INFORMATION ABOUT THE C	ASH ISA YOU WISH TO TRANSFER		
Progressive Cash ISA account nu	mber		
3. TRANSFER INSTRUCTIONS			
	epresenting current tax year subscriptions can only be transferred in whole and r ffer partial current tax year subscriptions, but other providers might.	ıot	
Do you want to close your existing	Cash ISA and transfer the full amount? Yes 🗌 No		
If you answered No , please comple	te the questions below:		
• If you are transferring part of	your Cash ISA, enter the amount you want to transfer £		
- Have you made subscriptions to the Cash ISA you are transferring in the current tax year? Yes \Box No \Box			
• If Yes , are you transferring su	bscriptions you have made in the current tax year? Yes 🗌 No	,	
• If Yes , enter the amount of cu	rrent tax year subscriptions you want to transfer £		
Any restrictions?			
If the Cash ISA you are transferrir you want us to:	ng from has any withdrawal restrictions, for example a notice period or fixed term	ו, do	
 Wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with the transfer: or 			
	as possible and you will accept any loss of interest or exit charges ance with the terms and conditions of that account.		
4. TRANSFER AUTHORITY AND			
	y to transfer my Progressive Cash ISA (account number above) to either:		
My other existing Progressive Cash ISA account number			
New Cash ISA account	A to transfer funds into, you must also complete a Cash ISA Application form.		
h you are opening a new cash is	a to transfer funds into, you must also complete a Gash ISA Application form.		

Date:

Branch/Agent

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

Progressive Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Financial Services Register Number 161841. All calls may be recorded and/or monitored. The Society is a member of the Building Societies Association. The Society has an internal complaints procedure. Complaints that cannot be resolved may be referred to the Financial Ombudsman Service, Exchange Tower, London E14 9SR (tel: 0800 023 4567 or 0300 123 9123) email: complaint.info@financial-ombudsman.org.uk. The Society is a subscriber to the Financial Services Compensation Scheme. Further details are available on request from the Society or by visiting our website: theprogressive.com or the Financial Services Compensation Scheme website: fscs.org.uk.

Unless otherwise stated, the law of Northern Ireland will apply and all communications and documentation in relation to this contract will be in English. You submit to the non-exclusive jurisdiction of the Northern Irish Courts.

Branches & Agents across Northern Ireland theprogressive.com