



If you transfer a Cash ISA to Progressive and have built up previous tax year flexible allowances with your current provider, you will lose that allowance when you move to Progressive. If you wish to use the flexible allowance you should re-deposit into your existing Cash ISA **before** you transfer to Progressive.

- Complete this 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.

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**Please note**

- The amount in your account representing current tax year subscriptions can only be transferred in whole and not in part. Progressive doesn't offer partial transfers of current year subscriptions, but other providers might.
- We cannot accept a transfer of current year subscriptions if you have **already** made a subscription to a Cash ISA with Progressive in the current tax year.

Do you want to close your existing Cash ISA and transfer the full amount? Yes ☐ No ☐

*If you answered **No**, please complete 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 ☐ No ☐
  - If **Yes**, are you transferring subscriptions you have made in the current tax year? Yes ☐ No ☐
  - If **Yes**, enter the amount of current tax year subscriptions you want to transfer £

TRANSFER AUTHORITY AND SIGNATURE

I authorise my existing Cash ISA provider to:

- transfer my Cash ISA to Progressive Building Society;
- provide Progressive Building Society with any information about my Cash ISA; and
- accept any instructions from Progressive Building Society relating to the Cash ISA being transferred.

Where I must give notice to close or transfer part of the existing Cash ISA in accordance with the terms and conditions applying to that account, or the existing Cash ISA contains a fixed-term deposit that has not reached its maturity date, I instruct my existing Cash ISA provider to either:

- wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer ☐

**Please note Progressive Building Society Cash ISA Bonds can be withdrawn without notice.**

or

- carry out the transfer as soon as possible and I will accept any loss of interest or exit charges that may be applied in accordance with the terms and conditions of that account. ☐

Signature:  Date:

5. TRANSFER ACCEPTANCE - to be completed by Progressive Building Society once returned

We are willing to accept this Cash ISA transfer in line with the customer’s instructions above, as long as the following conditions have been met:

- the transfer proceeds are made up of cash deposits only;
- where the customer wants to transfer subscriptions from the current tax year, these must not be more than the amount shown in question 3 overleaf.

For the purposes of the transfer of the ISA wrapper under the ISA regulations, the transfer date will be the date we receive the funds.

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

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.