



# Transfer your ISA to Beanstalk

## WHAT TO DO WITH THIS DOCUMENT

This is a written instruction to your current provider to transfer your ISA to Beanstalk. Please fill out this form carefully, then print and sign it. Finally, just put it in an envelope clearly addressed to **Freepost KIDSTART**. You won't need a stamp or any other details.

Or if you prefer, cut off the address label on the last page, stick it onto your envelope, and mail it to us with the completed form.

You will need to print and fill in a separate form for each ISA you wish to transfer to us.

We're sorry, but this process does require paper and a wet (ink) signature. We'll check your form and get back to you if we need to verify anything.

## YOUR DETAILS

(Remember, all of the details below must match what your current provider have in their system, otherwise the transfer may get declined)

Surname		Title	
Forename(s)			
Address			
Postcode			
Phone number			
Date of birth			
National Insurance No.			

## CURRENT ISA DETAILS

Type of Investment (select one)	<input type="checkbox"/> Cash ISA, or <input type="checkbox"/> Stocks & Shares ISA
ISA provider's name	
ISA provider's address	
ISA account number	
The investment will be transferred into a Stocks & Shares ISA.	
Specify how much is to be transferred.	<input type="checkbox"/> Transfer the full balance of the account <input type="checkbox"/> Transfer part of the account balance
	If part, the amount to transfer: £ <input type="text"/>

## DECLARATION & SIGNATURE

### I declare that:

- I have read and understood the Beanstalk ISA key features document and terms and conditions;
- The information contained in this form is correct to the best of my knowledge and belief;
- For transfers from cash ISAs only, I understand that the cash I am transferring will be transferred into a stocks & shares ISA.

### I authorise KidStart Limited:

- to hold my subscriptions, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash; and
- to make on my behalf any claims to relief from tax in respect of ISA investments.

**I authorise the ISA manager specified above to transfer my ISA to KidStart Limited and, if applicable, to close my account.**

Signed:	
Date:	

Cut here

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 BEANSTALK

**FREEPOST KidStart**