

# Cash ISA transfer form

Bira Bank  
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If you do not already hold a bira bank Cash ISA, or wish to open an additional Bira Bank cash ISA, please complete our 'Account Opening Form' in the first instance.

Please note that you can transfer a cash ISA held with another provider into a bira bank Cash ISA at any time.

This form should only be used to request the transfer of an existing cash ISA to Bira Bank.

To transfer money held in a cash ISA with another provider, please complete this form using black ink and BLOCK CAPITALS and return it to us at the address shown to the right. If you are transferring money from multiple cash ISAs, please complete one form for each separate ISA account you wish to transfer.

Please call us on 0121 446 6688 (option 6) if you need any assistance completing any of our forms.

Bira Bank Cash ISA Account Number:

## Personal details

Title  First name

Middle name(s)

Surname

Date of birth    National Insurance number

Address

Postcode

Contact Phone No.

## Details of transfer

I wish to transfer my existing Cash ISA from (name of current provider):

Sort code:  Account number:

To my existing/new bira bank Cash ISA. Please indicate which of the following applies to your transfer:

- This transfer only consists of previous years' ISA subscriptions.
- This transfer includes only ISA investments from the current tax year.
- This transfer includes ISA investments from the current tax year and from previous year ISA subscriptions.

Full transfer (please put a cross in the box to select this option)

Please close and transfer all of my ISA

Part transfer: please transfer the following amount from my ISA

£

**Note: subscriptions for this tax year must be transferred in full including interest.**

I authorise Bira Bank:

- (i) To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash.
- (ii) To make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA Terms and Conditions that I read and accepted when opening my account.

I authorise my current provider to transfer money to my Bira Bank Cash ISA. Please make cheques payable to Bira Bank Ltd.

Please tick as appropriate:

No notice period is required for closure/part transfer of the existing cash ISA

When a period of notice is required for closure/ part transfer of the existing cash ISA, or the existing cash ISA holds a fixed term deposit that has not yet reached its maturity date, I give my consent to either:

(i) Serve the full notice period or wait until the scheduled maturity date (as appropriate) before this instruction can be processed or

(ii) Subject to terms and conditions, proceed as soon as possible with the transfer and I will bear any consequential loss of interest or any other charge which may be applied

Signature

Date

BIRA BANK LIMITED is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services register No. 204478)

Registered office: 225 Bristol Road, Edgbaston, Birmingham B5 7UB.  
Registered in England. Company No. 0555071

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