

**BP INDIVIDUAL SAVINGS ACCOUNT
TRANSFER AUTHORITY**

To transfer existing Individual Savings Account(s) held in your name with another ISA manager to HSBC Trust Company (UK) Limited, please complete this form in full and return it together with a completed Transfer Application Form to: HSBC Trust Company (UK) Limited, Corporate Individual Savings Accounts, Frobisher House, Nelson Gate, Commercial Road, Southampton, SO15 9DF.

If you require the transfer of more than one ISA, please complete one transfer authority form for each account you are transferring and attach all Transfer Authority Forms together. Photocopies of the Transfer Authority Form are acceptable.

PLEASE COMPLETE IN BLOCK CAPITAL LETTERS

PERSONAL DETAILS

🔒 Please refer to the 'Your Information' section in the Corporate ISA Terms and Conditions which will explain how we will use this information

Title	Surname	Forename(s)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Permanent Residential Address

<input type="text"/>			
<input type="text"/>			
<input type="text"/>			
<input type="text"/>			
Postcode	<input type="text"/>	Daytime Telephone Number	<input type="text"/>

Date of Birth	<input type="text" value="DDMMYYYY"/>	National Insurance Number (if you have one)	<input type="text"/>
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EXISTING ACCOUNT MANAGER DETAILS

Name of your current ISA manager

Address

<input type="text"/>			
<input type="text"/>			
<input type="text"/>			
<input type="text"/>			
Postcode	<input type="text"/>	Telephone Number	<input type="text"/>

EXISTING ACCOUNT DETAILS

Type of ISA to be transferred (please tick) Cash Stocks and Shares

Existing Account Number

A. Current Tax Year subscriptions to be transferred? Yes No

If yes, all current Tax Year subscriptions must be transferred.

Please enter the actual or an estimated transfer value £

B. All previous Tax Year subscription(s) to be transferred? Yes No

Please indicate the total transfer value in the box provided, if only part of previous years subscriptions(s) are to be transferred please indicate the value that is to be transferred only. £

TRANSFER AUTHORITY

If transferring a Cash ISA

I authorise my existing manager (as specified overleaf) to transfer the ISA (account number specified overleaf) to HSBC Trust Company (UK) Limited. I authorise my existing manager to provide HSBC Trust Company (UK) Limited with any information, written or non-written, concerning the Cash ISA and to accept any instruction from them relating to the Cash ISA being transferred.

If transferring a Stocks & Shares ISA

I authorise my existing ISA manager (as specified overleaf) to transfer the ISA (account number specified overleaf) to HSBC Trust Company (UK) Limited. I authorise you to sell the appropriate investments held in my account with the exception of BP shares which are to be transferred as stock. I authorise my existing manager to provide HSBC Trust Company (UK) Limited with any information, written or non-written, concerning the Stocks & Shares ISA and to accept any instruction from them relating to the Stocks & Shares ISA being transferred.

For both Cash and Stocks & Shares

Where a period of notice is required for closure / part transfer of the existing ISA, I give my consent to either: (tick as appropriate)

1. serve the full notice period before this instruction can be processed

OR

2. proceed immediately with the transfer and bearing any consequential penalty which may be applied.

Authority:

Signature:

Date:

Transfer acceptance (to be completed by new ISA manager)

In circumstances where the funds to be transferred are not cash deposits, BP Shares, or the current year subscriptions exceed [£.....], please notify me as I may not be able to accept the transfer. Otherwise I (HSBC Trust Company (UK) Limited) am willing to accept this investor's ISA funds, subject to HMRC rules (the ISA Regulations). I deem the date shown below to be the transfer date of this ISA.

Date: Telephone:

Name:

Address:

Postcode:

Once completed this form should be returned to the address at the top of the first page