

Power of Attorney

If you are not the applicant, but are signing on behalf of the applicant, please enter your name in the box below and describe the legal capacity in which you are signing this form.

If you are applying for an ISA transfer for someone else, please note that you are only entitled to sign this form under the following circumstances:

1. If the applicant is mentally or physically incapacitated and you are the applicant's appointed attorney then a Property and Affairs Lasting Power of Attorney must be registered with the Office of the Public Guardian (Enduring Power of Attorneys made prior to 1st October 2007 must be registered with the Court of Protection where the applicant is mentally incapacitated). Alternatively you may be appointed as a deputy by the Court of Protection. A certified copy of the Power of Attorney or a stamped copy of the Court of Protection Order will be required to process the application.
2. Or you have a valid Power of Attorney granted for convenience. A certified copy of the Power of Attorney will be required and must have been granted within the last twelve months.

Name

Capacity

If you are signing this form as attorney because the applicant is physically incapacitated, please tick this box

If you are signing this form as attorney because the applicant is mentally incapacitated, please tick this box

If you are signing this form as attorney granted for convenience, please tick this box

Information about products services and promotions

If you agree, the HSBC Group may use and share relevant information about you, your transactions and your relationships with the HSBC Group, to give you information about products, services (including mortgages) and promotions available from members of the HSBC Group and selected third parties which may interest you by post, telephone, electronic and other means. The HSBC Group may also exchange, analyse and use relevant information about you in the way described above to ensure that promotional content displayed to you on screen when you log on to HSBC Group websites is more likely to be relevant and of interest. If you do not want us to use what we know about you to decide what we display to you on our websites, please let us know. Further information is available on our privacy statement at our website www.hsbc.co.uk. By completing this application you will be consenting to the use of your information for this unless you tick the appropriate box(es) below to indicate that you do not wish to receive such information;

No post

No email

No telephone

No mobile messaging

By signing this application, you agree that we can use your information in the way set out above and in our terms and conditions.

Declaration

I apply to transfer my existing cash ISA as detailed in the Transfer Authority of this application to an HSBC Fixed Rate Cash ISA with HSBC Bank plc. If you already hold an HSBC Fixed Rate Cash ISA a new HSBC Fixed Rate Cash ISA will be opened.

In transferring my cash ISA, I authorise HSBC Bank plc:

- to hold my ISA subscriptions and any interest earned on those subscriptions
- to make on my behalf any claims to relief from tax in respect of ISA investments

Bank records will be updated from the information provided, where appropriate

I hereby declare that:

- I have read the Cash ISA brochure and agree to the HSBC General ISA terms and conditions.
- This application form has been completed to the best of my knowledge and belief and I will notify HSBC Bank plc without any delay of any change in my circumstances affecting any of the information given in the Application. Where the information I have supplied relates to other people I declare that I am authorised by them to disclose that information and to accept the terms on their behalf.
- I am 16 years of age or over.

 Signed

Date

D	D	M	M	Y	Y	Y	Y
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Important Checklist

Before submitting, please ensure that you have completed all sections of this application form:

All personal details

Signed and dated the declaration form

Power of Attorney (if applicable)

All sections within the Transfer Authority ensuring it is signed and dated

If you do not currently bank with us, or if your existing identification is not up to date, you will need to take this form into your local HSBC branch together with at least one form of identification and one form of address verification

Please note we cannot process your transfer form without this information and failure to complete the above may result in a delay.

Cash ISA Transfer Authority Form

Your information

Title Mr Mrs Miss Dr Other (please specify)

Surname

First name

Permanent Residential Address

Date of birth

D				M				Y				Y			
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 Postcode

National Insurance number

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Details about your ISA you want to transfer

Name of the existing ISA manager (e.g. Bank or Building Society)

ISA Sort Code

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 ISA Account Number

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ISA Roll Number (If applicable)

The ISA regulations state that current tax year subscriptions to a cash ISA must be transferred as a whole. Partial transfers of current tax year subscriptions to a cash ISA are not allowed.

Have you subscribed to the ISA you are transferring in the current tax year? Yes No

If you are transferring the current tax year subscriptions please tick this box

Note: If you have ticked 'No' to having subscribed to the ISA you are transferring or you have not subscribed to any other cash ISA in the current tax year and wish to subscribe to a Fixed Rate Cash ISA you must complete a Fixed Rate Cash ISA application form (a separate account will be opened for current tax years subscriptions).

Previous tax year(s) subscriptions to a cash ISA can be transferred in whole or part. Please indicate which of the following is to be transferred. The entire ISA (including interest) Part of the ISA

If you wish to transfer part of the ISA, please specify the amount you would like to transfer £

Your Transfer Authority (please sign and date)

I authorise my existing ISA Manager (as specified above) to transfer the ISA (account number above) to HSBC Bank plc. I authorise my existing ISA Manager to provide HSBC Bank plc with any information, written or verbal, concerning the cash ISA detailed above and accept any instructions from them relating to the cash ISA being transferred.

Where 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: (ISA investor to tick as appropriate)

- Serve the full notice period or wait until the scheduled maturity date (as appropriate) before this instruction can be processed
- Proceed immediately with the transfer bearing any consequential fee which may be payable

Signed

Date

D				M				Y				Y			
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For Bank use only

Transfer Acceptance (to be completed by new ISA Manager)

In circumstances where the funds to be transferred are not cash deposits, please notify us as we will not be able to accept the transfer. Otherwise we, HSBC Bank plc are willing to accept this investor's cash ISA funds, subject to HMRC rules (the ISA regulations)

HSBC Bank plc, Coventry DSC, Harry Weston Road, Binley, Coventry CV3 2SH

HSBC Bank plc is authorised and regulated by the Financial Services Authority.
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Registered Office: 8 Canada Square, London E14 5HQ

hsbc.co.uk

Issued by HSBC Bank plc

Customer Information: PO Box 757, Hemel Hempstead, Hertfordshire HP2 4SS

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