

ISA to Lifetime ISA transfer form

This form lets you transfer a Help to Buy ISA, a cash ISA or cash from a stocks and shares ISA with another provider into your AJ Bell Youinvest Lifetime ISA. If you want to transfer cash from your AJ Bell Youinvest Stocks and shares ISA to your Lifetime ISA, don't complete this form – instead, just log into your account online and select 'Move cash between accounts'.

To transfer from a Lifetime ISA with another provider to your Lifetime ISA you need to complete a Lifetime ISA to Lifetime ISA transfer form. The easiest way to start your transfer is by logging into your account and selecting 'Transfers'. Alternatively, the form can be found in the 'Useful forms' area of the website.

You can only transfer cash (not investments) from a Help to Buy, cash or stocks and shares ISA with another provider to your AJ Bell Youinvest Lifetime ISA, and the maximum you can transfer is the annual Lifetime ISA allowance of £4,000. But this will be reduced if you've made payments to your Lifetime ISA (or transferred in from other types of ISA) this tax year.

Once the transfer from your external ISA is complete, you can withdraw money free of charge once you've reached age 60, if you're buying your first home, or if you're terminally ill. If you withdraw under any other circumstances, you'll have to pay the government withdrawal charge of 20% (25% from 6 April 2021) – which could mean you get back less than you put in.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at enquiry@youinvest.co.uk.

Please sign and date this application form and return it to

4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Personal details

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

National Insurance number

AJ Bell Youinvest Lifetime ISA account number

Date of birth

Permanent residential address

Postcode

Daytime telephone number

Email address

Date of birth

Declaration

I declare that:

1. I confirm that the information provided in this form is to the best of my knowledge and belief, correct, complete and not misleading.
2. I understand and accept that AJ Bell Securities Limited accepts no responsibility for any losses that may arise as a result of any delays in the transfer to my AJ Bell Youinvest Lifetime ISA.
3. I understand that the cash I am transferring will be transferred into a stocks and shares Lifetime ISA.

Name

Date

Signature

ISA transfer authority

Please confirm the transfer you wish to make (please tick one box):

I want to transfer my entire account Approximate transfer value £

'I want to transfer part of my account Approximate transfer value £

This is a transfer from a

Help to Buy ISA

Cash ISA

Stocks and shares ISA

ISA manager's name

ISA manager's address

Postcode

ISA reference to be transferred

Please confirm your sort code (if applicable) if you're transferring from a Help to Buy or cash ISA

I authorise the ISA manager specified above to transfer the requested cash from my existing ISA to AJ Bell Youinvest and, if applicable, to close my existing account.

Name

Date

Signature

To the existing manager. Regular savings: Please stop the collection of any regular savings plan with immediate effect, if the transfer will include subscriptions paid to my ISA in the current tax year.