

LIFETIME ISA

Lifetime ISA to Lifetime ISA transfer form

This form lets you transfer cash and investments from a Lifetime ISA with another provider into your Lifetime ISA with AJ Bell Youinvest.

To transfer from a Help to Buy, cash or stocks and shares ISA to your Lifetime ISA, you need to complete an 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.

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

AJ Bell Youinvest
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Personal details

Title

Surname

Forename(s)

National Insurance number

AJ Bell Youinvest ISA account number

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.

Please print your name, sign and date below to confirm you have read and understood the above declarations. You'll also need to sign the transfer authority section below.

Name

Date

Signature

Lifetime 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 £

Lifetime ISA manager's name

Lifetime ISA manager's address

Postcode

Lifetime ISA reference to be transferred

Please complete one box only for the transfer:

Stock and shares Lifetime ISA

Please transfer my stocks and shares Lifetime ISA to AJ Bell Youinvest as:

Investment Cash Both

or

Cash Lifetime ISA

Please transfer my cash Lifetime ISA to AJ Bell Youinvest:

Sort Code (if applicable):

Assets to be transferred

If you're transferring US or Canadian stocks to your Lifetime ISA, you'll need to complete:

- A W-8BEN form for US stocks. You can complete it online by logging in and selecting 'Update my details', then 'Complete W-8BEN'

A NR301 form for Canadian stocks. You can download it on our 'Useful forms' page.