

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	<input type="text" value="Dr / Mr / Mrs / Miss / Ms / Other"/>	Surname	<input type="text"/>
Forename(s)	<input type="text"/>	National Insurance number	<input type="text"/>
AJ Bell Youinvest Lifetime ISA account number	<input type="text"/>		
Permanent residential address	<input type="text"/>		
<input type="text"/>			
<input type="text"/>		Postcode	<input type="text"/>
Daytime telephone number	<input type="text"/>	Email address	<input type="text"/>
Date of birth	<input type="text"/>		

Declarations

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.

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:

<p>Stock and shares Lifetime ISA</p> <p>Please transfer my stocks and shares Lifetime ISA to AJ Bell Youinvest as:</p> <p>Investments <input type="checkbox"/> Cash <input type="checkbox"/> Both <input type="checkbox"/></p>	OR	<p>Cash Lifetime ISA</p> <p>Please transfer my cash Lifetime ISA to AJ Bell Youinvest: <input type="checkbox"/></p> <p>Sort Code (if applicable): <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/></p>
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I authorise the Lifetime ISA manager specified above to transfer my existing Lifetime 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 Lifetime ISA in the current tax year.

Investments to be transferred

If you ticked 'Investments' for transferring from a stocks and shares Lifetime ISA, then please complete the table below with the investments to be transferred.

If the table is not completed in full the transfer of investments may be delayed.

Cash element

Name of investment	SEDOL/ISIN	Units	Value (£)

Please continue on a separate sheet if necessary.

Important note

If your transfer to us includes any funds that are not clean funds, and a clean fund equivalent exists, we will convert these funds into their clean fund equivalent. If there is no clean fund equivalent we will hold the fund in its existing form, but will be entitled to convert it in future if a clean fund equivalent is created.

Further instructions

If any of the investments detailed above is a US stock, please complete form W-8BEN and forward it along with this form.

If any of the investments detailed above is a Canadian stock, please complete form NR301 and forward it along with this form.