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HB Markets Self Select Stocks & Shares ISA Transfer Form

PLEASE COMPLETE FORMS IN BLOCK CAPITALS

INVESTOR DETAILS

Title:_____

First Name:_____

Middle Initial:_____

Surname:_____

Date of Birth: | | | | | | | | |
DD MM CCYY

National Insurance Number: | | | | | | | | | |

Permanent Residential address:

_____

_____

_____

_____

Post Code:_____

HB General Account Ref: _____ HB ISA Account Ref: _____

EXISTING PLAN MANAGERS DETAILS

Name of Plan Manager:_____

Address: _____

_____

_____

Postcode: _____

Tel: _____

PLAN DETAILS

ISA Plan Number: _____

Type of ISA (Cash or Stocks & Shares): _____

Year of ISA to be transferred: ALL _____

Type of Transfer Cash or Stock: _____

Instruction to existing Plan Manager

I hereby authorise you to transfer this ISA Account in full to the HB Markets Self Select Stocks and Shares ISA on their written instruction.
Please provide HB Markets plc with all relevant information concerning my ISA, as they require.

Signature: **Date:**

CHECK LIST

- ❑ Have you signed and dated the Transfer In form?
- ❑ Have You completed the Plan Managers and Plan details?

On completion of this form please return to:

ISA Department, HB Markets plc, 131 Finsbury Pavament, London, EC2A 1NT

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