

# Help to Buy: ISA Transfer Authority Form



Please complete sections 1, 2 and 3 if you wish to transfer your existing Help to Buy: ISA in full to Virgin Money.

Transferring your Help to Buy: ISA from one institution to another can take up to 15 business days. We will work with your current Help to Buy: ISA provider to do the transfer as quickly as possible.

**Your new Help to Buy: ISA account number will need to be included on the Transfer Authority Form (otherwise it may delay processing).**

Please return the completed form to Virgin Money, Operations, Jubilee House, Gosforth, Newcastle upon Tyne NE3 4PL.

## 1 - Personal information

Title	<input type="text"/>	Surname	<input type="text"/>			
Forename(s)	<input type="text"/>					
Date of birth (dd/mm/yyyy)	<input type="text"/>	National Insurance number	<input type="text"/>			
Permanent residential address	<input type="text"/>					
	<input type="text"/>					
	<input type="text"/>					
	<input type="text"/>	Postcode	<input type="text"/>			
Contact tel. number	<input type="text"/>					

## 2 - Information about the Help to Buy: ISA to be transferred

Name of existing Help to Buy: ISA manager	<input type="text"/>				
Address of existing Help to Buy: ISA manager	<input type="text"/>				
	<input type="text"/>				
	<input type="text"/>	Postcode	<input type="text"/>		
Sort code	<input type="text"/>	Account number/ roll number	<input type="text"/>		
Have you subscribed to your existing Help to Buy: ISA in the current tax year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>			

## 3 - Transfer authority

Please provide your Virgin Money Help to Buy: ISA account number:

I authorise my existing Help to Buy: ISA manager to transfer the Help to Buy: ISA (account number in section 2) to Virgin Money plc in full. I authorise my existing Help to Buy: ISA manager to provide Virgin Money with any information about my Help to Buy: ISA and to accept any instructions from them relating to the Help to Buy: ISA being transferred.

Please complete the sections on the reverse.

Please tick the most appropriate box:

**Are there any Notice requirements on your existing Help to Buy: ISA?**

1. No – No notice is required for transfer or closure
2. Yes – Where I must give notice to close or transfer the existing Help to Buy: ISA in accordance with the terms and conditions applying to that account, or the existing Help to Buy: ISA contains a fixed-term deposit that has not reached its maturity date, I instruct my existing Help to Buy: ISA provider to either:
- a) wait for the full notice period to end or wait until the maturity date (whichever is relevant) before going ahead with this transfer
- or
- b) carry out the transfer as soon as possible – I will accept any loss of interest or exit charges that may be applied in accordance with the terms and conditions applying to that account

Signed

Date (dd/mm/yyyy)

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#### 4 - Transfer acceptance (to be completed by Virgin Money once returned)

We are willing to accept this Help to Buy: ISA transfer in line with the customer's instructions above, as long as the value is transferred as cash.

I deem the date shown to be the transfer date of this Help to Buy: ISA

Name: Virgin Money plc  
Telephone: 0345 600 7301\*  
Address: Virgin Money,  
Operations,  
Jubilee House,  
Gosforth,  
Newcastle upon Tyne  
NE3 4PL

\*Lines are open 8am to 8pm business days, 8am to 4pm Saturday and 10am to 3pm Sunday. Calls to 03 numbers cost the same as calls to 01 or 02 numbers and they are included in inclusive minutes and discount schemes in the same way. Calls may be monitored and recorded.