

## Stocks & Shares ISA Transfer-In Instruction

### Personal details

Title Mr  Mrs  Miss  Ms  Other (please state)

Full name

Address

Postcode  Daytime telephone number

Date of birth  National Insurance number

(DD/MM/YYYY)

Transfer to stocks & shares ISA number

### Declaration

I wish to transfer my existing ISA detailed below to my stocks & shares ISA, managed by AJ Bell Securities Limited, with immediate effect.

I hereby authorise AJ Bell Securities Limited, the ISA Manager, to hold any cash and investments transferred from my existing ISA Manager, along with any subsequent interest, dividends and any other rights or proceeds in respect of those assets, and to make on my behalf any claims to relief from tax in respect of ISA investments.

**I confirm that I have been recommended and given the opportunity to read and ensure that I understand and retain a copy of the Supplemental ISA Terms and Conditions which are contained within the MAIA Asset Management Ltd Agreement before I sign this application. By signing this application, I confirm my agreement to the Supplemental ISA Terms and Conditions.**

Signature  Date  /  /

### Existing ISA details

Name of existing ISA Manager

Sort-code (if applicable)  ISA number with existing provider

### Declaration

Please transfer my existing ISA detailed above to my stocks & shares ISA, managed by AJ Bell Securities Limited, with immediate effect.

I hereby declare that you may provide AJ Bell Securities Limited with all information relating to my ISA and that you may act upon any instructions from AJ Bell Securities Limited relating to this transfer.

Please make the transfer: In specie  In cash

Signature  Date  /  /