

# ISA (AND EX-PEP) TRANSFER AUTHORITY FORM

Please complete a transfer authority for each of the ISAs (or ex-PEPs) you wish to transfer to Avalon. We will contact you if for any reason the plan manager cannot make the transfer. This form should be completed along with the appropriate ISA application form.

## Transfer instruction

Please transfer my ISA (ex-PEP): in cash  in specie

Some ISA plan managers may not be able to transfer in specie - we will let you know if they are unable to comply with your request.

Approximate value of transfer: £

Current ISA plan manager:

Account number:

Their address:

Postcode:

I hereby instruct my current ISA plan manager named above to arrange the transfer of my ISA (ex-PEP) with immediate effect to the new Plan Manager, Avalon Investment Services Ltd, 2 Market Place, Tetbury, Gloucestershire GL8 8DA.

Your title:

Forenames:

Surname:

Signature:

Date:

### To the ISA plan manager:

Please make cheques payable to Avalon Client Money Account and send the full ISA history as soon as possible.

Avalon is the trading name of Avalon Investment Services Limited.  
Registered Office: 2 Market Place, Tetbury, Gloucestershire, GL8 8DA.  
Registered Number: 3792386 England.  
Authorised and Regulated by the Financial Services Authority.



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