

**Transfers Database – New Information Request**

This form should only be used to add new details to the transfers database (where no details are present for the ISA manager)

Please email the form to: isatransfers@tisa.uk.com

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| --- | --- |
| ISA Manager Name: |  |

|  |  |
| --- | --- |
| HMRC ISA Manager Reference: |  |

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| **Company Information** |
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| Brand/Name (additional info. If relevant): |  |

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| --- | --- |
| Postal address for transfer requests: |  |

|  |  |
| --- | --- |
| Alternative postal address for couriers: |   |
|  |
| Working Hours/days: |  |
|  |  |
| Settlement proceeds payment policy: |  |

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| --- | --- | --- | --- |
| Will accept residual income payments: |  | Minimum payment accepted (£): |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Partial Transfers: |  | Specie transfers allowed: |  |

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| --- | --- | --- |
|  Type(s) of ISA provided: | CashStocks & SharesInnovative Finance Lifetime ISA |  |
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| Additional information (e.g. product restrictions, account number format): |
|  |
| **Database Manager**Please provide details of the contact who will be responsible for maintaining the information on behalf of your company (database manager). The role will allow the person named below to be able to manage user access to the database too.Once we have uploaded the details the database manager will be sent an email with access details and a user guide.

|  |  |  |
| --- | --- | --- |
| Contact Name | Contact Number | Contact email |
|  |  |  |

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Any problems in accessing or amending details can be emailed to isatransfers@tisa.uk.com