## Stocks and shares ISA to M&S Cash ISA transfer form



## Part A - ensure you also fill in Part B

If completing by hand, use black ink, BLOCK CAPITALS and initial any alterations.

For more detail on how we will use your personal information, please see our Privacy Notice at marksandspencer.com/bankprivacynotice.

You must provide all personal information. Any incomplete or incorrect information on the form will cause a delay and we may have to return the form to you. Please call 0808 002 2222 if you need any help.

PLEASE NOTE THIS IS NOT AN APPLICATION FORM. PLEASE COMPLETE SEPARATE FORMS FOR EACH ACCOUNT TO BE TRANSFERRED.

	ersonal details							
If yo	u are an existing M&S savings a	and investment	ts customer, please ei	nter your client refer	ence number			
Title					Forename			
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Moh	ile tel number			 Email address				
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Date [		Name of new ISA		

## Stocks and shares ISA to M&S Cash ISA transfer form

ISSUE 49	PERS
Source code	

## Part B - ensure you also fill in Part A

You must provide all personal information. Any incomplete or incorrect information on the form will cause a delay and we may have to return the form to you. Please call 0808 002 2222 if you need any help.

Are you now or have you ever been known by any other name(s)?  Yes No If yes, please specify the full names below  Country of birth Country of permanent residential address  Current and previous address details  Current permanent residential address  Rease note in most circumstances, we are unable to accept c/o or Po box addresses.  Postcode  Postcode  Postcode  Postcode  Previous address  Country How long have you lived there? years months previous address below from the permanent residential address less than three years, please supply all other addresses you have lived at cluring this period. If you need additional space, please use a blank piece of paper.  Postcode  Postcode  Postcode  Postcode  How long did you live there? years months  3. Nationality and tax residency  Nationality and tax residency  Nationality clustership (1)  You may be a national or citzen of a country if it has issued you with a passport, or if you have the right to vote in its national elections for example, if you hold more than one nationality/clitzenship, please include these below (you can include up to three).  Nationality/citzenship (2)  Nationality/citzenship (3)  Nationality/citzenship (3)  Nationality/citzenship (3)  Nationality/citzenship (4)  At home  Unemployed  At home  Unemployed and time Employed part time Employed  Pat home  Unemployed Time Self-Employed or a business owner.  Employment details — Please refer to the application guide enclosed for further information.  Employment details — Please refer to the application guide enclosed for further information.  Employment role  Business owner  Employeer full or part time/self-employed please complete:  Employment role  Business owner  Employeer full or part time/self-employed please complete:  Employers/pusiness name  Employers/pusiness address	1. Personal details		
Fortname   Middle nume(s)   Summer   Middle nume(s)   Summer   Middle nume(s)   Yes   No	Please refer to the applica	tion guide enclosed for further information.	
Are you now or have you ever been known by any other name(s)?    Yes	If you are an existing M&S	savings and investments customer, please e	enter your client reference number
Country of birth	Forename	Middle name(s)	Surname
2. Current and previous address details  Current permanent residential address Places note, in most circumstances, we are unable to accept c/o or PIO box addresses.  Postcode  Provious addresses  If you've been at your current permanent residential address less than three years, please supply all other addresses you have lived at during this period. If you need additional space, please use a blaink piece of paper.  Provious address  If you've been at your current permanent residential address less than three years, please supply all other addresses you have lived at during this period. If you need additional space, please use a blaink piece of paper.  Postcode  Country  Postcode  Postcode  Country  Askionality citzenship (1)  You may be a national to citzen of a country if it has issued you with a passport, or if you have the right to vote in its national elections for example. If you hold more than one nationality/citzenship, please include these below (you can include up to three)  Nationality/citzenship (2)  Nationality/citzenship (3)  Nationality/citzenship (4)  Nationality/citzenship (6)  Nationality/citzenship (7)  Nationality/citzenship (8)  Nationality	Are you now or have you	ever been known by any other name(s)?	Yes No If yes, please specify the full names below
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Previous address  If you've been at your current permanent residential address less than three years, please supply all other addresses you have lived at during this period. If you need additional space, please use a blank piece of paper.  Postcode  Postcode  Postcode  A was longlid you live there?  Postcode  Postcode  Postcode  Postcode  A was a national to citizen of a country if it has issued you with a passport, or if you have the right to vote in its national elections for example. If you hold more than one nationalitycitizenship, please include these below (you can include up to three). Nationality/citizenship (2)  In which country/countries are you resident for tax purposes? This is the country/countries in which you are liable to pay income and/or Capital. Gains lâx (if you're resident for tax purposes in more than one country, please also provide these—you can include up to three). If you are resident for tax purposes in more than one country, please also provide these—you can include up to othere). If you are resident for tax purposes in the same countries to which you have already confirmed your nationality/citizenship, (3)  4. Current income details  Employment status  Employed full time  Employed part time  Employed Student  What is your gross annual income?  At home  Unemployed  Journal income from all sources before tax or any other deductions (eg salary if you are employed part or full time, annual reanings from business if you are self-employed or a business owner).  Employment details — Rease refer to the application guide enclosed for further information.  Employment or leading a surpose in the surpose in the application guide enclosed for further information.  Employment or leading a surpose in the application guide enclosed for further information.  Employment or leading a surpose in the application guide enclosed for further information.  Employment or leading a surpose in the application guide enclosed for further information.  Employment or leading a surpose in the application guide encl			Postcode
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4. Current income details  Employed full time			
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Employed full time			
At home Unemployed Student  What is your gross annual income? This is your annual income from all sources before tax or any other deductions (eg salary if you are employed part or full time, annual earnings from business if you are self-employed or a business owner).  Employment details – Please refer to the application guide enclosed for further information.  Employment role Business owner Key controller Sole trader Employee  If you are employed full or part time/self-employed please complete:  Employer's/business name  Employer's/business address  Industry type Agriculture, forestry & Banking Chemicals & allied Computers & telecommunications Foods, drink & tobacco insurance brokers  Metal manufacturing Mining & quarrying Other manufacturing Professional & scientific  Public sector, transport & Public services Social services Vehicle manufacturing		Employed part time Self-	Retired/receiving pension Receiving disability benefi
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If you are employed full or part time/self-employed please complete:  Employer's/business name  Employer's/business address  Industry type  Agriculture, forestry & Banking Chemicals & allied Computers & telecommunications  Construction Distribution Estate agents & Foods, drink & tobacco insurance brokers  Metal manufacturing Mining & quarrying Other manufacturing Professional & scientific  Public sector, transport & Public services Social services Vehicle manufacturing			
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communication L	Metal manufacturi	ng Mining & quarrying	
		sport & Public services	Social services Vehicle manufacturing
			Occupation

5. Savings options					
Please read the <b>four savings options</b>					
total must come to 100%. <b>If you do n</b> o		tions' section, we will automatically	select option 1 on your behalf.		
i) Variable rate option (Advantage)	ed as follows::				
Interest will be automatically credited	to the variable rate cash ISA c	ontion annually			
Option 1 Variable rate cash ISA opti					
		%			
ii) Fixed rate option – Issue 49					
Interest will be automatically credited indicate that you want interest to be p			inless you tick the boxes below to		
<b>Option 2</b> Fixed rate option for 1 year	3	Minimum £500 trans	fer		
· ·		% Pillindin 2500 trans	Interest to be paid out		
<b>Option 3</b> Fixed rate option for 2 year	rs	Minimum £500 trans	fer Interest to be paid out		
<b>Option 4</b> Fixed rate option for 3 year	rs	Minimum £500 trans	fer		
- The arace operation of a year		%   Millimum £500 trans	Interest to be paid out		
To have your maturity proceeds sent of	lirectly to your bank/building	society account at the end of your ch	nosen term, please ensure you		
complete section 6 of this form.					
6. Bank details					
			ds and your interest, if you have opted lding society account. <b>Please refer to</b>		
the enclosed booklet for important			taing society account. I tease Telef to		
Name of account holder(s)					
Branch sort code		Account number			
Building society roll number		Bank/building society name			
Address		P	ostcode		
L					
7. Declaration					
I apply to transfer to a M&S cash ISA. I					
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PLEASE ENSURE YOU HAVE COMPLETED BOTH PARTS A AND B OR WE WILL BE UNABLE TO PROCESS YOUR TRANSFER

Signature

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Date **X**