

Date

Portfolio Reference

Personal Details

Name

Date of Birth

Contact Details

Address Line 1

Address Line 2

Address Line 3

Town

County

Postcode

Telephone Number

Email Address

Tax

National Insurance Number

Transfer Details (One form required for each ISA you wish to transfer)

ISA Manager Name

ISA Manager Postcode

Estimated ISA Value

Current Tax Year ISA Contributions

Reference/Account No.

Sort Code (if applicable)

Transfer Authority and Instruction

I authorise my current ISA manager detailed above as follows:

- To supply Scalable Capital and Winterflood Business Services ('WBS') with any information regarding my current ISA or wrap account which they may request at any time;
- To deal with the assets held in my current ISA or wrap account held in accordance with instructions received from Scalable Capital and WBS; and
- To make the transfer of my current ISA.

In respect of this instruction to transfer my current ISA or wrap account to my Scalable Capital ISA, please arrange for the sale of my assets held in my current ISA or wrap account and the transfer of my cash proceeds to my Scalable Capital ISA.

Declaration and Authorisation

I authorise Scalable Capital to instruct WBS to hold my cash contributions, investments, interest, dividends and any other rights or proceeds in respect of those investments and cash.

I confirm that I have received the Scalable Capital Investment Management Agreement and agree to be bound by it.

I declare that this Transfer Form has been completed to the best of my knowledge and belief.

I consent that any personal information obtained by you may be held and used or disclosed to a third party to enable you to process this transfer, and to enable Scalable Capital and WBS to process my ISA, or any subsequent transactions and to communicate with me directly or indirectly for any purpose. For any avoidance of doubt, this includes the provision of relevant information to my agents and custodians or relevant third parties from time to time.

Date:

Signature: