

ISA Investor withdrawal form



Before completing this form and for an explanation of the terms used, please refer to the enclosed leaflet 'Your guide to making withdrawals from your ISA Investor' which also includes guidance on how to complete this form.

1. Personal details

Please amend any details if incorrect

Full name:

Address:

Postcode:

Account number: 6

OR Plan number: 14/

Telephone number:
including STD code

2. Withdrawal type

Tick one of the following options below (ticking more than one will invalidate this form).

I wish to sell **all** shares in my plan and **continue** with monthly payments (complete sections 5 and 6 only)

I wish to sell **all** shares in my plan **except** the minimum operating amount (complete sections 5 and 6 only)

I wish to sell **some** of the shares in my plan (complete sections 3, 5 and 6 only)

I wish to sell **shares in a specific fund, a set number of shares or a percentage of shares** from my plan (complete sections 4, 5 and 6 only)

I wish to **close** my plan (complete sections 5 and 6 only)

3. To sell some of your investments held

Do not fill out this section if you are selling ALL the shares in your plan – go straight to section 5.

Please state the value you wish to sell.

Amount in figures £

and amount in words

Tick here if you wish to sell a Capital Protected Option(s)

Please enter (month/year) of the Capital Protected Option(s) you wish to sell. You can find this information on your contract note.

Please read the note on Capital Protected Options in the enclosed leaflet if you're unsure whether this section is relevant to you or call us on 0345 366 1513 for more information.

4. Detailed withdrawal

To sell shares held in specific funds, a set number of shares or withdraw a percentage of value from the plan, please enter the details in the box below.

5. Payment details

Tick one of the options below as to where you would like your payment to be made to

Home address

Bank account

(Please note the bank account must be in the plan holder's name – complete details below)

Bank or Building society

Branch sort code

Account number

Account holder(s) **

Building society roll number

****We will only make payment to the legal owner of the plan.**

6. Please sign and date

Signature

Date

Please ensure all relevant sections are completed before returning the form to us at HBOS Investment Fund Managers Limited
PO Box 28132, 15 Dalkeith Road, Edinburgh EH16 9BF.



HBOS Investment Fund Managers Limited, registered in England number 941082. Registered office in the United Kingdom at Trinity Road, Halifax, West Yorkshire HX1 2RG. Authorised and regulated by the Financial Conduct Authority. Financial Services Register number 119223.

Halifax Financial Services is a trading name of Scottish Widows Limited. Scottish Widows Limited is registered in England and Wales No. 3196171. Registered office in the United Kingdom at 25 Gresham Street, London EC2V 7HN. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Financial Services Register number 181655.

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