

GIA to ISA completion instruction

If your personal circumstances mean you need any additional support, or if you'd like a large print, braille or audio CD version of this document, please call 03456 081 680 (call charges will vary) or visit aegon.co.uk/support.

Use this form to request a transfer of money from the cash facility of a General Investment Account (GIA) to an Individual Savings Account (ISA). **Before completing this form you must have already sold the transferring assets to cash in the GIA and set up the ISA transaction online.**

Please complete this form by typing in the boxes and emailing to clientsupport@arc.aegon.co.uk

Our email support and the way we deal with data internally is secure, however we're unable to ensure the security of emails before they reach us. Please consider this when sending us sensitive information.

1. Customer details

Customer number – this is the customer who holds the ISA.

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Customer name

Title: Mr/Mrs/Miss/Other

Forename(s)

Surname

2. Transfer details

2.1 Please tell us the wrapper number of the GIA from which the funds should be transferred:

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Is it a joint GIA?

Yes - where this is a joint GIA, the ISA holder must be one of the joint holders.

No

Amount to be transferred

£

I confirm that the full amount to be transferred is available within the cash facility of the wrapper or a switch to cash has already been submitted online.

2.2 Please tell us the wrapper number of the ISA into which the funds should be transferred:

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I confirm that the relevant ISA top up or new ISA transaction has been completed online.

2.3 **Only complete this section if funds are being transferred into an ISA belonging someone other than the GIA holder.**

I confirm that the funds have been gifted to the person named below and they are aware that the transfer is being made

Name of ISA investor

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3. Adviser information

Name of adviser or registered individual

Name of firm



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