

LIFETIME ISA TRANSFER FORM

Transfer your existing Lifetime ISA (LISA) to Paragon. Please complete a new form for each LISA you're transferring, additional forms can be found on our website. Please don't send any additional funds to your new Paragon LISA until your transfer is complete, we'll confirm when that is. Any funds you do send in the meantime will be held but earn no interest. Cash LISA transfers can take up to 30 working days.

Please complete this form in BLOCK CAPITALS and return to us Freepost at: **RTEX-LLUT-KKKE, Paragon, PO Box 850, Wallsend NE28 5BJ**

We will only complete transfers from your existing Lifetime ISAs to a Paragon Cash Lifetime ISA. Transferring a Stocks and Shares LISA will result in all investments currently being sold. The sale proceeds, together with any un-invested cash currently held in the LISA will be transferred in its entirety to Paragon.

Personal information	
Paragon Lifetime ISA account number / application reference (leave blank if your Paragon Lifetime ISA isn't open)	
Title	First name(s)
Middle name(s)	Surname
Date of birth	National Insurance Number
Address	
Postcode	
Telephone	

Details of transfer	
I wish to transfer my existing LISA from (Provider name)	
Sort code	Account number / Roll number

To my existing LISA provider, please close and transfer all of my LISA

Please note that any amount representing subscriptions for the current tax year will also be transferred in full including interest and will be subject to the annual LISA subscription limit of £4,000.

I authorise Paragon

1. To hold my cash subscription, LISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash.
2. To make on my behalf any claims to relief from tax in respect of ISA investments.

I authorise my current provider

1. To transfer the money to my Paragon Cash Lifetime ISA. Please make cheques payable to Paragon Bank re my name and Paragon application reference.
2. To provide Paragon with any information, written or non-written, concerning the LISA and to accept any instructions from them relating to the LISA being transferred.

Print name	Date
Signed	

PARAGON (FREEPOST) RTEX-LLUT-KKKE, PO BOX 850, WALLSEND NE28 5BJ

2217-1 (07/2020)

 savings@online.paragonbank.co.uk

 www.paragonbank.co.uk

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We recommend you print and keep this information for your personal records or to refer to in the future.