



# Lifetime ISA to cash ISA transfer

For transferring a Lifetime ISA to a cash ISA with Santander UK plc.

Santander UK plc is **not** a flexible ISA provider.  
Santander doesn't offer a Lifetime ISA.

Santander will not charge you for this transfer, however your existing Lifetime ISA manager may. Please check with your existing Lifetime ISA manager for details of any fees, penalties and charges associated with your Lifetime ISA.

**For internal use only**

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**How to fill in this form**

Use this form to transfer in funds you already have in a Lifetime ISA to the cash ISA you already have with Santander.  
You must already hold a Santander cash ISA to use this form.  
Please ensure the terms and conditions of your Santander cash ISA allow transfers in.

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**1 About you**

Title (Mr, Mrs, Ms, Miss, Other)

First name(s)

Middle name

Surname

Date of birth

National Insurance number

Telephone number (including area code)

Mobile number

Permanent residential address

Postcode

Santander cash ISA sort code

Santander cash ISA number

Email address

**2 Details of the Lifetime ISA to be transferred**

Lifetime ISA provider

Address of existing Lifetime ISA provider

Postcode

Existing Lifetime ISA number

Existing Lifetime ISA sort code

Existing Lifetime ISA Roll Number (if applicable)

Existing stocks and shares Lifetime ISA account number/reference

PL :

As well as being subject to the terms of the cash ISA receiving the transfer proceeds, the transfer will be made subject to the terms and conditions applying to your Lifetime ISA.

For example:

- Your existing Lifetime ISA provider may need you to give them specific information before the transfer can go ahead.
- There may be outstanding fees to pay before the transfer goes ahead.

If you are not sure what conditions apply please check with your existing Lifetime ISA provider before completing this form.

If applicable, all investments currently held will be sold and the sale proceeds, together with any uninvested cash currently held in the Lifetime ISA will be transferred to your Santander cash ISA in its entirety.

By ticking the box, I confirm that I wish to transfer all of my Lifetime ISA to my cash ISA with Santander.

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- We do not accept residual income payments.
- If you have any questions regarding these payments please contact your existing Lifetime ISA provider.

**3 Declaration Authority – important information to read prior to signing the Declaration (Section 5)**

I apply to transfer my existing Lifetime ISA from the existing Lifetime ISA provider, named in section 2, to Santander UK plc.

- c) For establishment and defence of legal rights;
  - d) For activities relating to the prevention, detection and investigation of crime;
  - e) To verify my identity, make credit, fraud prevention and anti-money laundering checks; and
  - f) To monitor emails, calls, other communications, and activities on my account.
4. Based on **my consent**, e.g.:
- a) When I request you to disclose my personal data to other people or organisations such as a company handling a claim on my behalf, or otherwise agree to disclosures;
  - b)

from third party data sources such as credit reference agencies, will also be used to provide me with an indication of the price). The personalised price would be presented to me in marketing communications and during contacts with Santander that might be suitable. You'll look at the types of accounts that I already have with you, as well as my age, where this is relevant to the product you think I might be interested in. You'll also conduct behavioural scoring, including by looking at the accounts and products I already Yn

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Santander can provide literature in alternative formats. The formats are: large print, braille and audio CD. If you'd like to register to receive correspondence in an alternative format please visit [santander.co.uk/alternativeformats](https://www.santander.co.uk/alternativeformats). For more information, ask us in branch or give us a call. If you are deaf, have hearing loss or speech loss, please use Relay UK at [relayuk.bt.com](https://www.relayuk.bt.com). This is a

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