



Shepherds ISA

Withdrawal Form

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

A Personal Details

1 Mr/ Mrs/ Ms / Miss / Other 2 Male Female 3 Surname

4 Forename(s)

5 Address

Postcode

6 Telephone **(Home)** Telephone **(Mobile)**

Telephone **(Business)** Email address

7 Date of Birth

8 National Insurance (NI) Number

B Details of ISA to be withdrawn

Shepherds Stocks and Shares ISA Plan Number

1 Do you want to close your current stocks and shares ISA and withdraw all the balance, including the accrued interest? Yes No

Partial withdrawals are only allowed for subscriptions made in previous tax years. The minimum balance following a partial withdrawal must be £100.

2 Have you subscribed to your current stocks and shares ISA in the current tax year? Yes No

If you answered YES to Q1, please ignore Q3 & Q4

3 If you answered YES to Q2: Do you want to withdraw current tax year subscriptions as part of this withdrawal? Yes No

4 Please specify how much of your stocks and shares ISA you want to withdraw: £

Signature _____ Date _____

Full Name _____

(BLOCK CAPITALS PLEASE)

Note: Acceptance of this application is at the discretion of Shepherds Friendly.

The Shepherds Friendly Society Limited

Registered Office: Shepherds House, Stockport Road, Cheadle, Cheshire SK8 2AA Tel: 0161 428 1212 Fax: 0161 428 3666

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THE SHEPHERDS FRIENDLY SOCIETY IS INCORPORATED UNDER THE 1992 FRIENDLY SOCIETIES ACT NO.240F. AUTHORISED AND REGULATED BY THE FINANCIAL SERVICES AUTHORITY AND ENTERED ON THE FINANCIAL SERVICES AUTHORITY REGISTER, NO:109997.

The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.