

## How to contact us

[www.vanguardinvestor.co.uk](http://www.vanguardinvestor.co.uk)  
[personalinvestors@vanguard.co.uk](mailto:personalinvestors@vanguard.co.uk)

Miss M Zaccaron  
Flat 38  
Catalpa Court  
Hither Green Lane  
London  
SE13 6TG

Vanguard  
PO Box 24095  
1 Tanfield  
EDINBURGH  
EH3 1FS

You can also contact us via the secure messaging facility available within your online account.

2 September 2021

Dear Miss Zaccaron

Thank you for transferring to Vanguard. Because your existing provider doesn't offer electronic transfers, we need you to sign this paper 'Transfer Authority Form':

- 1.** Print this form and sign it at the bottom
- 2.** Post it to us at:  
Vanguard  
PO Box 24095  
1 Tanfield  
EDINBURGH  
EH3 1FS
- 3.** We'll process your transfer request. If we need any further information from you we'll contact you.

Yours sincerely,



Alexandra Carr  
Head of Personal Investor Services, UK

## Your details

Martina Zaccaron  
23 August 1989  
+44 7716621356  
Flat 38  
Catalpa Court  
Hither Green Lane  
London  
NI number: **SZ053154C**  
Account number: **VG0048389**

## Existing account details

Skipton Building Society  
Account number: 995039191  
Principal Office  
The Bailey

## ISA transfer authority

By signing this form I authorise you, the Plan Manager, to:

- Transfer my Individual Savings Account (ISA), as specified below, to Vanguard.

- ☒ Vanguard funds  
(also known as re-registration)
- ☐ Cash
- ☐ Both

- ☐ Current tax year ISA  
I wish to transfer 100% of my current  
tax year ISA.
- ☒ Previous tax years  
I wish to transfer £0.00 (estimated) of  
my previous tax years ISA.

- Provide any information that Vanguard may require on my behalf, including, but not limited to, details of the current plan(s) and value(s), and transaction and dividend histories.
- Remit any cash balance in my account to Vanguard.

Any approved Vanguard holdings are to be transferred across as existing units/shares whilst any non-Vanguard investments are to be sold and transferred across as cash. Vanguard does not offer a cash ISA.

I understand that:

- My current Plan Manager may not support the re-registration transfer, and may sell my holdings (i.e. 'encash' them) and send the money to Vanguard. In this instance, Vanguard will confirm to me the amount of money received.
- If I have not provided any investment instructions, any money received from the transferring plan manager by 'encashment' will remain un-invested. I do, however, confirm the cash will be held in my Vanguard account for the purpose of investment.
- Vanguard will consolidate all my ISAs held on the platform into one Vanguard Individual Savings Account (ISA).
- Charges may be deducted prior to transfer to Vanguard

**Signature:**

**Date:**