

Transfer your Help to Buy ISA to your Lifetime ISA

You'll need to complete this form if you'd like to transfer your Help to Buy ISA to your One Family Lifetime ISA.

Before you complete this form, please make sure you have read the Key Information Document relating to the fund that your Lifetime ISA is invested in. You should also make sure you have read the Important Information Document and the Terms & Conditions for your OneFamily Lifetime ISA. For existing customers this will include any updates we may have sent you.

I authorise Family Equity Plan Limited:

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- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds (including any Lifetime ISA government bonus) in respect of those investments and any other cash;
- to make on my behalf any claims to relief from tax in respect of ISA investments;
- o to submit Lifetime ISA bonus claims to HMRC on my behalf;
- o to withhold and deduct from a balance in the Lifetime ISA and to pay to HMRC any charges due on withdrawals; and
- to make a record in writing in accordance with Regulation 12B paragraph 7(a) of the Individual Savings Account Regulations where required to do so.

Please complete the form in **BLOCK CAPITALS** using black ink. If you make any amendments please make sure you initial them.

Once you have completed this form, please return it to us at: FREEPOST ONEFAMILY

i. Your de	Talls														
We will use the i	Ve will use the information that you provide in this section to identify you and your Lifetime ISA with us.														
Your OneFamily	Lifetime ISA number:														
Title	Your first name		Middle initial(s) Your surname												
National Insuran	ice Number:														
Date of birth	D D M M Y Y Y	Y Y	Gender (please tick) Male Female												
Permanent UK re	esidential address														
			Postcode Postcode												
Phone number (i	ncluding dialling code):														

The information that you provide will be held by Family Equity Plan Limited, part of the OneFamily Group, in line with our Privacy Notice.

The information we collect is necessary for the performance of our contract with you, or to prepare for this contract.

Your data will be shared with our group of companies for administration purposes and we will also share your data with service providers, business partners and other agencies who assist us with providing the product and ongoing servicing to you where there is a business reason to do so.

Where you have provided your consent, we will use your data to email you about selected products or services offered by us or selected partners we work with. You may unsubscribe from email marketing communications at any time.

We may also use your information to identify and prevent fraud, to provide postal communications which we think may be of interest to you, and to improve our services to you, for example by market research, if we have a legitimate business interest to do so.

If you would like more details about how we process your personal data and your rights as a data subject before you provide your personal information to us, please read our Privacy Notice which is available on our website at www.onefamily.com/privacy. A copy is also available by writing to OneFamily, 16-17 West Street Brighton, BN1 2RL; by calling Customer Services on 0344 8 920 920 or, by email to customerservices@onefamily.com.

2. Information about the Help to Buy ISA you'd like to transfer

The information that you give here is what we need to be able to contact your Help to Buy ISA provider to arrange the transfer. The information you give here will also help us determine if the amount you wish to transfer is within the Lifetime ISA allowance.

The name of the company that provides your Help to Buy ISA:

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Please note:

- We can only accept the full value of your existing Help To Buy ISA.
- o You may use the proceeds from either a Lifetime ISA or Help To Buy ISA to help buy your first home, but you cannot use the proceeds from both.
- The amount transferred into your Lifetime ISA will count towards your overall annual Lifetime ISA limit and we are unable to accept transfers that will exceed the current Lifetime ISA limit
- You must have held your Lifetime ISA for a minimum of 12 months before the proceeds can be used to buy your first home. The period the funds were saved in a Help To Buy ISA do not count towards this 12 month period.

Please see our Lifetime ISA important information document and the Terms and Conditions for more information. Your Help To Buy Provider will transfer your funds to us by cheque. We will accept the payment the day we receive the cheque from your Help To Buy provider and the money will be invested in your chosen fund by the end of the following working day. Please note, that the end to end timescale is dependent upon how quickly your Help To Buy provider sends us the cheque.

Important

Please remember that by transferring into your OneFamily Lifetime ISA, your money will be invested in stocks and shares. The value of stocks and shares is not guaranteed and can go down as well as up. This means that you could lose some or all of your money.

Please note, OneFamily do not offer advice on or assess the appropriateness of this product.

Transfer authority

You must sign this declaration to give us the authority to contact your Help to Buy ISA provider on your behalf and arrange the transfer.

I authorise my existing ISA provider to transfer the Help to Buy ISA (account number in section 2) to OneFamily. I authorise my existing ISA provider to provide OneFamily with any information about my ISA and to accept any instructions from them relating to the ISA being transferred.

Signature	×
Print name	×
Date	D D M M Y Y Y Y

We may need to verify your name and address so that we can comply with anti-money laundering legislation. We may use credit reference agencies to help us do this and by signing this application form, you are agreeing to these checks taking place.