

**Application For**

(please insert name of the product to be applied for e.g. 6 month Fixed Rate SIPP/SSAS Account  
leave blank if transferring funds between two existing accounts)

**Transfer Instructions**

From existing Account Number:

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**a) Amount to transfer to new account**

(a new account for the product outlined above will be opened)

£

**b) Amount to transfer to existing Newcastle Building Society Account**

Please provide receiving NBS account number

£

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**c) Amount to return to originating bank account**

(funds cannot be sent to any other external bank account other than the one from which the original deposit was made)

£

If full balance required, please write "ALL" in relevant box.

\* Transfers will only be carried out in line with the terms and conditions of the existing account. If notice is required please provide evidence of the notice period being served.

**Transfer Method**

a) Cheque^ made payable to

b) CHAPS\*\* to originating bank account

^ Cheques must be made payable to the originating bank account re the underlying member.

\*\*A CHAPS fee will be charged. Please contact us for full details of our current charges.

**Declaration**

I/We agree that all funds transferred will be subject to the terms and conditions of the new account. I/We have seen the product terms and conditions for the account applied for above, and the general terms and conditions and have read and understood them.

(copies of our product terms and conditions are available from our website [www.newcastleis.co.uk](http://www.newcastleis.co.uk) or by calling 0845 603 9299)

I/We confirm that no material changes have been made to any of the standard documentation upon which the Society based its original due diligence on this pension scheme.

**Signatories**

1. Member's Name:

Date

Signature:

**SIPP/SSAS Trustees**

2. Name of Trustee/Authorised Signatory for the trustee company:

Date

Signature:

3. Name of Trustee/Authorised Signatory for the trustee company:

Date

Signature:

**Intermediary Services, FREEPOST RR-LSUS-SATIK, PO Box 1219, Newcastle upon Tyne, NE1 8WA.**

If you need any help or have any queries please call us on 0845 603 9299.

Intermediary Services is a trading name of Newcastle Building Society. Newcastle Building Society is authorised and regulated by the Financial Services Authority (FSA) and is entered in the FSA's register under number 156058.