

AiM IHT Service

ISA TRANSFER FORM



ISA Transfer Form

Please note this Transfer Form contains interactive boxes to help you fill in the Form online. You have the choice of either filling in this Transfer Form online or on hard copy. In order to use this functionality, please download and open the form in the latest version of Adobe Acrobat. You must print and sign a hard copy of this Transfer Form.

This form is for an investment in Stellar AiM IHT Service when transferring ISA portfolios from an existing ISA Manager. By completing this form, you agree to the terms set out in the Stellar AiM IHT Service Brochure and dated April 2026 as amended from time to time.

Please use a separate ISA Transfer Form for each existing ISA manager's portfolio you wish to transfer.

If this is a new account, you must also complete an Application Form for the Stellar AiM IHT Service.

Definitions

Stellar Asset Management Limited - Investment Manager

Third Platform Services Limited - ISA Manager (Z1888) and Custodian

Applicant personal details

Title

Forename(s)

Surname

Permanent residential address

Daytime telephone no.

Email address

Postcode

Date of birth (DD/MM/YYYY)

National Insurance no.

Stellar AiM IHT account no.*

*Please complete if you already have an ISA account with us.

You can find your NI number: online through your personal tax account, in the HMRC app, or in any documents you already have, for example, a payslip, P45 or P60.

If you do not have a National Insurance No., tick here

For your own benefit and protection, you should read the Terms and Conditions of the ISA Manager (the "Terms and Conditions") which will form part of your agreement with us.

Transfer details

Instructions to transfer to the Third Platform Services Stocks & Shares ISA.

Approximate transfer value £

Existing ISA type

Stocks and shares

Cash

Innovative finance

Lifetime

If partial transfer, please tick one

Amount in cash £ Or

Specific holdings documented as detailed on separate sheet

If full transfer, please tick one

Please transfer in-specie (unless your terms do not allow this, in which case act as below)

Please sell ISA investments and transfer in cash

Subscriptions made in this current year £

Existing ISA manager details

Name

Address

Postcode

Account no.

Telephone no.

Transfer Authorisation by Investor to Existing ISA Manager.

I authorise you to discuss this transfer with Third Platform Services Limited by telephone and/or via correspondence sent to **'Third Platform Services Limited, 8th Floor, Centennium House, 100 Lower Thames Street, London, EC3R 6DL'**.

Applicant name

Signature of applicant (or power of attorney)

Date

ISA declaration

I declare to the ISA Manager, that:

- i) All subscriptions made, and to be made, belong to me;
- ii) I am 18 years of age or over;
- iii) I have not subscribed, and will not subscribe, more than the overall subscription limit total in the same tax year;
- iv) I am resident and in the United Kingdom for tax purposes or, if not resident, either perform duties which, by virtue of Section 28 of the Income Tax (Earnings and Pensions) Act 2003 (Crown Employees Serving Overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform the ISA Manager if I cease to be resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties;
- v) For my own benefit and protection I have been given the opportunity to read the ISA Manager's Terms and Conditions carefully and have had any questions I had concerning them answered to my satisfaction;
- vi) I have read and agree to the ISA Manager's Terms and Conditions; and
- vii) I consent to my personal data being used in accordance with the ISA Manager's Terms and Conditions.

I hereby authorise the ISA Manager to:

- i) To hold my cash subscription and ISA investments, in respect of the interest, dividends and any other rights or proceeds and to claim any relief from tax on my behalf; and
- ii) To give effect to my instructions in accordance with the ISA Manager's Terms and Conditions.

I declare that this application form has been completed to the best of my knowledge and belief. I will notify the ISA Manager, without delay, of changes to these particulars.

I have read and agreed to the declaration above.

Applicant name

Signature of applicant (or power of attorney)

Date

Get in touch

We're here to help

Investors

We recommend you speak to a Financial Adviser in the first instance, as we cannot offer investment or tax advice.

If you have any other questions please contact us on 020 3195 3500 or email us at enquiries@stellar-am.com

For further information, please visit www.stellar-am.com

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