

Ethical Unit-linked ISA Withdrawal Form

Please complete and return to Healthy Investment; if you have any questions or need help with completion you can contact us on 0161 762 5790.

Your details:

Full name

Address

National Insurance Number

ISA Number

Withdrawal:

Full withdrawal Tick

Part withdrawal Amount
£

The minimum withdrawal is £50 and the balance remaining in your ISA at the time of the withdrawal must be at least £50.

Your account details:

 This must be your bank or building society account.

Bank Name

Account No.

Sort Code

Account Holders Name

Building Society roll / reference number (if appropriate)

Contact details:

If case we need to contact you regarding your withdrawal please let us have your:

Telephone

Email

Declaration:

I wish to make the above withdrawal from my Healthy Investment Ethical Unit-linked ISA.

I am the person legally entitled to the above ISA. I understand that signing this form for someone else's ISA or providing someone else's bank details is fraud and could result in prosecution. Withdrawing the money means that Healthy Investment is no longer responsible for the amount withdrawn.

Signed: _____

Dated: _____

Identification:

As this is your first withdrawal, we have to comply with anti-money laundering law and verify your identity and that the bank account where we are sending the money is yours:

Copy of bank statement Tick

This can be a paper statement, a screen shot or printout of your online statement

Proof of identity Tick

This can be a copy of your passport or driving licence or a letter addressed to you from college, university, your employer or some other official person.

Feedback: (optional)

We're really interested to know how Child Trust Funds have helped young people or how they have invested or spent their money. Please tell us what plans you have for the amount you've withdrawn.

Return to:

Healthy Investment, 2 The Old Court House, Tenterden Street, Bury BL9 0AL
Tel: 0161 762 5790 Email: enquiries@healthyinvestment.co.uk

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