

LV= ISA

Full Cash-In Instruction Form

Important Notes

You can use this Instruction Form to:

Instruct us to cash in your LV= ISA plan – We'll cancel all the policies and the units within them and your plan will close. The ISA plan Conditions contains full information about cashing in under section A11, so you may wish to refer to this for more details.

Please return this completed form to:

LV=, PO BOX 342, Wymondham, NR18 8HS.

If you have any queries or you'd like help completing your instruction, please talk to your Financial Adviser or you can call us on **0800 681 6292**, between 9am - 5pm Monday to Friday.

Once you've fully encashed your plan you'll be unable to open another LV= ISA for 12 months from the date the plan closes.

If any premiums have been paid into this ISA in the current tax year, the amount paid in will still count towards the tax year ISA subscription limit, you will not be able to subscribe to another Stocks and Shares ISA within the same tax year once your plan is closed. This is also applicable where a transfer in has been received, which included current tax year premiums.

In some circumstances we may wait up to 10 working days, and in some exceptional circumstances even longer before we process your request, as set out in your ISA plan Conditions under section D1. If this is the case, we'll let you know when we receive your instruction.

Your details

LV= ISA plan number: _____

Title Mr/Mrs/Miss/Ms/Dr/Other _____

First name (s) _____

Surname _____

Payment instructions

Pay to the following account which is in my name:

Account holder name _____

Account number _____

Sort code - -

If the payment is to an account that is different from the account the original funds came from, and we haven't paid to it previously we may require further documents to verify account ownership.

Please contact us if you'd like the payment to be sent to a 3rd party. We'll require the following information:

- The full name, date of birth and address for the third party.
- The reason for paying to a third party.
- The relationship between the policy owner and payee.

Details will be verified against the records we hold before your claim is completed; in the event of a discrepancy we reserve the right to contact you for further details, including identification documents, before processing the payment.



