

# Internal Transfer Authority



Protected



## Set Up New Mandate

I/We hereby authorise Leek United, until further notice, in writing to make a regular transfer in accordance with the details below:

1st Payment Date	<input type="text"/>
Regular Payment Date	<input type="text" value="every week/month (delete as appropriate)"/>
Amount of Payment	<input type="text"/>
Transfer from Investment Account Number	<input type="text"/>
Transfer to Investment/Mortgage Account Number	<input type="text"/>

Please ensure to also sign where indicated overleaf.

### Transfers into an ISA or a Mortgage account

Please ensure you read the 'Important Information' section fully if you are making transfers into an ISA or a Mortgage account.

## Amend Existing Mandate

I/We hereby authorise Leek United to amend my/our transfer in accordance with the details below:

Transfer from Investment Account Number	<input type="text"/>
Transfer to Investment/Mortgage Account Number	<input type="text"/>
Change Regular Payment Date	<input type="text" value="every week/month (delete as appropriate)"/>
Change Amount of Payment	<input type="text"/>

Please ensure to also sign where indicated overleaf.

### Transfers into an ISA or a Mortgage account

Please ensure you read the 'Important Information' section fully if you are making transfers into an ISA or a Mortgage account.

### IMPORTANT INFORMATION

#### Transfers into an ISA Account

If you are setting up a mandate to making regular payment transfers into an ISA account, and you haven't used any of your ISA allowance with Leek United for an entire tax year, you will also need to complete an ISA Application Form to re-register your ISA account. These can be obtained from our branches, agencies or you can download them from our website [leekunited.co.uk/savings/savings-application-forms](http://leekunited.co.uk/savings/savings-application-forms).

#### Transfers into a Mortgage Account

If you are setting up a mandate to make regular payment transfers into a mortgage account and your mortgage rate is/becomes variable, Leek United will notify you prior to any rate changes which affect your mortgage. If you would like us to automatically amend your regular payments to reflect the new monthly mortgage payment, please confirm by ticking this box:

# Cancel Existing Mandate

Please cancel my/our Internal Transfer Authority in accordance with the details set out below:

Effective From	<input type="text"/>
Regular Payment Date	<input type="text" value="every week/month (delete as appropriate)"/>
Amount of Payment	<input type="text"/>
Transfer from Investment Account Number	<input type="text"/>
Transfer to Investment/Mortgage Account Number	<input type="text"/>

If you are making transfers from an account that requires multiple signatures, please ensure all relevant account holders sign.

Applicant 1 Signature	<input type="text"/>	Print name	<input type="text"/>
Date	<input type="text"/>		

Applicant 2 Signature	<input type="text"/>	Print name	<input type="text"/>
Date	<input type="text"/>		

If you'd like this in a different format, such as Braille, large print or audio, please contact us.

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## OFFICE USE ONLY

Branch	<input type="text"/>	Input by	<input type="text"/>
Assistant name	<input type="text"/>	Date	<input type="text"/>

Please scan to Savings Department