

# Providers Requiring Paper Transfer Forms



Ulster Bank

Tomorrow begins today

If your provider is on either of the lists below, you'll need to complete a paper transfer form. These forms can be found under the FAQ 'What if I can't access the mobile app or Anytime Banking?'.

## Cash ISA Providers

- AEGON Investment Solutions Limited
- Aegon Nationwide
- Alzheimer
- Aviva Wrap UK Ltd
- AXA Investments
- Buckinghamshire Building Society
- Cambridge Building Society
- Columbia Threadneedle Fund Management Limited
- Countrywide Assured
- Elevate Portfolio Services Ltd
- Embark Investment Services Limited (Scottish)
- Evelyn Partners Investment Services Limited
- Family Building Society
- Fusion Wealth Ltd
- Integrated Financial Arrangements Ltd (Transact)
- Invesco Asset Management Ltd
- Investment Funds Direct Limited (M&G Wealth Platform)
- James Brearley & Sons Ltd
- Leek United Building Society
- M&S Bank
- Mansfield Building Society
- Marsden Building Society
- McInroy & Wood Ltd
- Melton Mowbray Building Society
- Meteor Asset Management Limited
- National Savings and Investments
- Newbury Building Society
- Nucleus Financial Services Ltd
- Parmenion Capital Partners LLP
- Perspective Managing Wealth
- Phoenix Life
- Royal London Savings Ltd
- Scottish Building Society
- Scottish Widows Unit Trust Managers Ltd
- Suffolk Building Society
- Triodos Bank

## Stocks and Shares Providers

- 7IM
- Abrdn Fund Managers Limited
- Aegon Asset Management UK PLC
- AEGON Investment Solutions Limited
- Aegon Nationwide
- Aegon Retail (Cofunds Ltd)
- Alzheimer
- Ancient Order of Foresters Friendly Society
- Aviva Wrap UK Ltd
- AXA Investments
- Barclays Investment solutions
- Barclays Smart Investor
- Brown Shipley & Co Ltd
- Buckinghamshire Building Society
- Charles Stanley & Co Ltd
- Chelverton
- Columbia Threadneedle Fund Management Limited
- Countrywide Assured
- Elevate Portfolio Services Ltd
- Embark Investment Services Limited (Scottish)
- Evelyn Partners Investment Services Limited
- Foresters Life Limited
- Fusion Wealth Ltd
- Handelsbanken Wealth Management
- HSBC UK Bank Plc – Global Investment Centre (GIC)
- HSBC UK Bank plc – InvestDirect and First Direct Sharedealing branded ISAs
- HSBC UK Bank Plc – Premier Investment Management Services (PIMS)
- HSBC UK Plc – Private Bank
- IG Group
- Integrated Financial Arrangements Ltd (Transact)
- Invesco Asset Management Ltd
- Investment Funds Direct Limited (M&G Wealth Platform)
- James Brearley & Sons Ltd
- JANUS HENDERSON
- M&G Securities Limited (M&G and myM&G)
- M&S Bank
- McInroy & Wood Ltd
- Melton Mowbray Building Society
- Meteor Asset Management Limited
- Morningstar Wealth Administration Limited
- Nucleus Financial Services Ltd
- Parmenion Capital Partners LLP
- Perspective Managing Wealth
- Phoenix Life
- Premier Miton Investors
- Quilter (ex Old Mutual Wealth)
- Quilter Cheviot Investment Management
- Raymond James Investment Services Ltd
- RBS Collective Investments
- Royal London Savings Ltd
- Santander ISA Managers Ltd
- Scottish Widows Unit Trust Managers Ltd
- Sheffield Mutual Friendly Society
- St James Place Investment Administration
- Standard Life Savings Ltd
- Triodos Bank
- True Potential Investments LLP
- Vanguard Asset Management
- Walker Crips Investment Management Limited
- WEALTH at work
- WEALTHIFY