

ISA - ADDITIONAL PERMITTED SUBSCRIPTION (APS)

TOP UP DECLARATION

Please complete this form in BLOCK CAPITALS and in ink

1. PERSONAL DETAILS

Your existing ISA account number

Title

Mr Mrs Miss Ms Other (please specify)

Surname

First name(s)

Permanent residential address:

Postcode

Date of birth (DD MM YYYY)

2. DECEASED CUSTOMER DETAILS

Surname

First name(s)

3. ADDITIONAL PERMITTED SUBSCRIPTION INFORMATION

I (the investor) wish to subscribe an additional £ from my APS in respect of the deceased and wish to make my subscription to a **Cash** ISA in cash (cheque attached)

Please tick the box below if you are also paying in an investment in respect of your current tax year ISA allowance.

Yes – the cheque enclosed includes an investment amount for this tax year and investment instructions for the total investment will be included on the Top Up Declaration Form.

4. ADDITIONAL PERMITTED SUBSCRIPTION ELIGIBILITY DECLARATION

This section must be completed to confirm the customer named on this application is eligible to make an APS to this ISA.

I declare that:

- The subscription is made under the provisions of regulation 5DDA of the ISA regulations
- The subscription is made within three years of the date of death (or three years from 6 April 2015 if the date of death was before this date) or if later, 180 days of the completion of the administration of the estate.
- All subscriptions made, and to be made, belong to me

I agree to the ISA terms and conditions

I declare that this APS Declaration form has been completed to the best of my knowledge and belief.

Signed

Date (DD MM YYYY)

