

## Application form (Lifetime ISA)

Full name

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Permanent residential address

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Day      Month      Year

Date of birth

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Enter National Insurance Number

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You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the DWP, or pension order book.

I apply to open and to make payments for a Lifetime ISA for the tax year 20    /    and each subsequent year in which I make a payment to the account.

### I declare that

- All cash payments made, and to be made, belong to me;
- Either:
  - I am 18 years of age or over and under 40,
  - or**
  - The account is being opened to receive investments from another Lifetime ISA, a defaulted Lifetime ISA subscription or a returned withdrawal after a failed first time residential purchase;
- I have not subscribed/made payments, and will not subscribe/make payments, more than the overall subscription/payment limit in total to a cash ISA, a stocks and shares ISA, an innovative finance ISA, and a Lifetime ISA in the same tax year;
- I have not made current year payments, and will not make current year payments, that exceed the Lifetime ISA payment limit;
- I have not subscribed and will not subscribe to another Lifetime ISA in the same tax year that I subscribe to this Lifetime ISA;
- I have not made current year payments, or transfers from a Help to Buy: ISA, and will not make current year payments, or transfers from a Help to Buy: ISA, to another Lifetime ISA in the same tax year that I subscribe to this Lifetime ISA;
- This declaration shall have effect for each year in which I make a payment to the account;
- I agree to the Lifetime ISA terms and conditions; and
- (Other than for accounts opened to receive investments from another Lifetime ISA, a defaulted Lifetime ISA subscription or a returned withdrawal after a failed first time residential purchase) I am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform [ISA manager's name] if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

**I authorise [ISA manager's name]**

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds (including any Lifetime ISA government bonus) in respect of those investments and any other cash;
- to make on my behalf any claims to relief from tax in respect of ISA investments;
- to submit Lifetime ISA bonus claims to HMRC on my behalf;
- to withhold and deduct from a balance in the Lifetime ISA and to pay to HMRC any charges due on withdrawals; and
- to make a record in writing in accordance with Regulation 12B paragraph 7(a) of the Individual Savings Account Regulations where required to do so.

**Managers need to include wording to satisfy the FCA requirement on reading and understanding terms and conditions - see <http://www.fsa.gov.uk/pubs/other/understood.pdf>.**

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

**Signed .....**      **Date .....**