

Application Form (stocks and shares ISA)

Full name

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Permanent residential address

Day Month Year

Date of birth

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Do you have a National Insurance (NI) Number?

Yes

No

Tick one box

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If Yes you must
enter it here

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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 subscribe for a stocks and shares ISA for tax year 20 / and each successive year until further notice.

I declare that

- all subscriptions made, and to be made, belong to me;
- I am 18 years of age or over;
- 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 subscribed and will not subscribe to another stocks and shares ISA in the same tax year that I subscribe to this stocks and shares ISA;
- 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; and
- I agree to the ISA terms and conditions.

I authorise [ISA manager's name]

- *where the ISA manager is not an insurer-manager* to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash

or

- *where the ISA manager is an insurer-manager* to hold my cash subscription, any other proceeds in respect of my ISA investments and any other cash;
and
- to make on my behalf any claims to relief from tax in respect of ISA investments.

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**
