

Telephone application

1. What is your name?

(Forename, middle initials, and surname)

2. What is your permanent residential address?

(Full address of the place you habitually reside, which must include postcode)

3. What is your date of birth?

(Day/Month/Year)

4a. Do you have a National Insurance number? (Tick one) **Yes** ☐ **No** ☐

4b. If yes, what is your National Insurance Number?

(Investors can find this on a pay slip, form P45 or P60
a letter from the HM Revenue & Customs, a letter from the DWP,
or pension order book.)

(Investors may not subscribe to a Lifetime ISA without a valid
National Insurance Number)

5. What tax year do you wish to subscribe to?

(Tax years run from 6 April to 5 April)

6. What type of ISA do you wish to subscribe to? (tick)

**STOCKS AND
SHARES**

**Do you declare that you have not subscribed/made
payments and will not subscribe/make payments more
than the overall subscription 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?**

☐

**Do you declare that you have not subscribed and will
not subscribe to another stocks and shares ISA in the
same tax year that you subscribe to this stocks and
shares ISA?**

☐

Do you declare that you are 18 years of age or over?

☐

OR

CASH

**Do you declare that you have not subscribed/made
payments and will not subscribe/make payments more
than the overall subscription 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?**

☐

**Do you declare that you have not subscribed and will
not subscribe to another cash ISA in the same tax year
that you subscribe to this cash ISA?**

☐

Do you declare that you are 16 years of age or over?

☐

OR

**INNOVATIVE
FINANCE**

☐

Do you declare that you are 18 years of age or over?

OR

OR

☐

LIFETIME ISA

Do you declare that you have not subscribed and will not subscribe more than the overall subscription 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?

☐

Do you declare that you have not made current year payments, and will not make current year payments, that exceed the Lifetime ISA payment limit?

☐

Do you declare that you have not made payments to and will not make payments to another Lifetime ISA in the same tax year that you open and make payments to this Lifetime ISA?

☐☐

Do you declare that you 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 you make payments to this Lifetime ISA?

Do you declare that you are either:

- ☐ **I am 18 years of age or over and under 40, or**
- ☐ **That the account is being opened to receive investments from another Lifetime ISA, a defaulted Lifetime ISA payment or a returned withdrawal after a failed first time residential purchase**

☐

Do you declare that

(tick box)

All subscriptions made, and to be made, to the ISA belong to you and that this declaration shall have effect for each year in which I make a payment to the account, and

☐

(Other than for accounts opened to receive investments from another Lifetime ISA, a defaulted Lifetime ISA payment or a returned withdrawal after a failed first time residential purchase) you are resident in the United Kingdom for tax purposes

☐

See the guidance on the [Gov.uk website](https://www.gov.uk).

Or, if not

You perform duties which by virtue of S28 of the Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas) are treated as being performed in the United Kingdom, or if not you are married to, or in a civil partnership with, a person who carries out those duties.

☐

You will inform [ISA Manager's name] if you cease to be so resident or to perform such duties, or to be married to, or in a civil partnership with, a person who performs such duties.

☐

By applying for an ISA you authorise us to carry out certain functions on your behalf. Details of these will be sent to you, with the terms and conditions of this ISA.

We will send you (or use one of the methods described in paragraph 4.19) a copy of the application you have made.