Individual Savings Accounts (ISAs)

ISA application form

When to use this form

Use this form as an example application form for customers opening a new ISA.

You should make it clear which ISA type the application form is for.

You must keep the written application form or an image copy of it for 6 years.

I apply to subscribe for a cash ISA for the tax year

2 0 [ ] [ ] to 2 0 [ ] [ ]

and each subsequent year until further notice.

Customer details

1 Full name

2 Permanent residential address

Postcode

3 Date of birth DD MM YYYY

4 You must provide a National Insurance (NI) number unless you do not qualify for one. Are you eligible for a NI number?
Put an 'X' in one box

Yes [ ]   If Yes, go to box 5

No [ ]

5 National Insurance number

You can find your National Insurance number:
- online through your personal tax account
- in the HMRC app
- in any documents you already have,
  for example, a payslip, P45 or P60

Declaration

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, and will not subscribe, to more than the overall ISA subscription limit total in the same tax year
- I am resident in the United Kingdom (UK) for tax purposes:
  – or if not resident, either perform duties which, by virtue of section 28 of Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the UK
  – or I am married to, or in a civil partnership with, a person who performs such duties
- I will inform the ISA account manager if I cease to be resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties
- I agree to the ISA terms and conditions

Authority

I authorise the ISA account manager to hold my cash subscription and ISA investments, in respect of the interest, dividends and any other rights or proceeds and to claim any relief from tax on my behalf.

Signature

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

Signature

Date DD MM YYYY