

# Individual Savings Accounts (ISAs)

## Model ISA application form

### When to use this form

This is an example of an application form which should be used 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

to

and each subsequent year until further notice.

### Customer details

**1 Full name**

  

**2 Permanent residential address**

  
  
  
  

**3 Date of birth DD MM YYYY**

**4 National Insurance number**

If you have your National Insurance (NI) number, please enter it in these boxes

You can find your NI number:

- online in your HMRC account or App
- in any documents you already have, for example, a payslip, P45 or P60
- at [www.gov.uk/find-national-insurance-number](http://www.gov.uk/find-national-insurance-number)

If you do not have an NI number, go to question 5.

**5** You must provide a National Insurance number to apply for an ISA unless you are not eligible for one. You can check if you're eligible and apply online at [www.gov.uk/apply-national-insurance-number](http://www.gov.uk/apply-national-insurance-number)

**Are you eligible for an NI number?**

Put an 'X' in one box

Yes  If Yes, you must apply for an NI number and provide it before you complete your ISA application. See link above.

No

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## 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

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## 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.

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## Signature

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

**Signature**

**Date** DD MM YYYY