

**Application Form (Cash ISA)**

**Full name**

**Permanent residential address**

	Postcode	

Day

Month

Year

**Date of Birth**

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**Do you have a National Insurance (NI) Number?**

Yes

No

If yes you must enter it here

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

I apply to subscribe for a cash ISA for the tax year 20 / and each subsequent year until further notice.

**I declare that**

- All subscriptions made, and to be made, belong to me;
- I am 16 years of age or over;
- I have not subscribed and will not subscribe more than £7,200 in total to a cash ISA and a stocks and shares ISA in the same tax year'
- I have not subscribed and will not subscribe more than £3,600 of the overall £7,200 total to a cash ISA;
- I have not subscribed and will not subscribe to another cash ISA in the same tax year that I have subscribed to this cash ISA, and
- I am resident and ordinarily 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 civil partnership with, a person who performs such duties. I will inform [ISA manager's name] if I cease to be so resident and ordinarily resident or to perform such duties or be, married to, or in civil partnership with, a person who performs such duties.

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

- *Where the ISA manager is not an insurance-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.

**I agree to the ISA terms and conditions**

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

**Signed**.....

**Date**.....