

Application form to open a Cash ISA account

The details you provide on this form will be used to create a customer record and open an account for you on our systems. Please fill in this form in black ink and use BLOCK CAPITALS. Please check any pre-printed personal details and change and initial them if they are not correct.

For our use only: A/C No.

I.D.

Part 1 The account holder

Title (Mr, Mrs, Miss, Ms and so on): _____ First name(s): _____

Surname: _____

Date of birth: _____ Nationality: _____

National Insurance Number: _____ Occupation: _____

If you do not know your National Insurance number you should be able to find it on a payslip, form P45 or P60, a letter from HM Revenue & Customs, a letter from the DWP or a pension order book.

Permanent address: _____

Postcode: _____

Phone no: Daytime _____ Evening: _____

If you have lived at your current address for less than 3 years, please write your previous address below:

Previous address:

Postcode: _____

If you already have a savings or mortgage account with us, please write your account number(s) here:

--	--

Part 2 The account you are opening

Please write the name of the ISA account you are opening

How did you hear about this account?

Part 3 The amount you are investing

How much are you investing?

£

The minimum and maximum investment for this account is shown in the account leaflet.

Part 4 The subscription

I apply to subscribe for a cash ISA for the tax year: 2 / 2 and each subsequent year until further notice.

Note: Tax years run from 6 April to 5 April the following year.

Part 5 Important Information

This is our standard application form upon which we intend to rely. You have been given our savings information pack which includes the following; savings account terms and conditions, product factsheet, privacy policy, FSCS details and charitable assignment conditions leaflet. For your own benefit you should read the contents of this pack.

Part 6 Additional ISA terms and conditions

1. The ISA investments will be, and must remain in, the beneficial ownership of the investor and must not be used as security for a loan.
2. The ISA manager will satisfy himself that any person to whom he delegates any of his functions or responsibilities under the terms agreed with the investor is competent to carry out those functions and responsibilities.
3. On the instructions of the investor and within the time stipulated by the investor, an ISA with all rights and obligations shall be transferred to another ISA manager. On the instructions of the investor and within the time stipulated by the investor, all the investments held in the ISA and proceeds arising from those investments shall be transferred or paid to the investor.
4. The ISA manager must notify the investor if, by reason of any failure to satisfy the provisions of the ISA Regulations, an ISA has, or will, become void.

Part 7 Declaration

- | | | | |
|----|---|-----|--|
| 1. | I am investing the amount shown on this form in Nottingham Building Society just for my benefit as the owner. | 7. | I authorise Nottingham Building Society to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash. |
| 2. | All subscriptions made, and to be made, belong to me. | 8. | I authorise Nottingham Building Society to make on my behalf any claims to relief from tax in respect of ISA investments. |
| 3. | I am 16 years of age or over. | 9. | The total amount I have invested in the Society, including the amount I am investing now and the total amounts in any other accounts where I am named as an individual, joint, trustee, nominee, or executor holder is not more than £750,000. |
| 4. | 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. | 10. | I will not invest any extra amounts that would increase the total amount I have invested as an individual, joint, trustee, nominee, or executor holder in the Society to more than £750,000. |
| 5. | I have not subscribed and will not subscribe more than the cash ISA subscription limit to one cash ISA. | 11. | I have read and agree to the terms and conditions of this account as set out in the product literature, savings account terms and conditions leaflet and this application form. |
| 6. | 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 Nottingham Building Society 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. | 12. | This application form has been completed to the best of my knowledge and belief. |
| | | 13. | I have been given clear and appropriate information in regards to the protection of my eligible deposits and the relevant exclusions. |

Part 8 Your signature

Please tick the box that applies:

1. I have already made up my mind about the account I want and don't need further help or information. ☐
2. I have been given clear and appropriate information on the different types of savings and investment accounts to help me choose the right one for me. ☐

Please sign below to confirm that you have read and agree to the Charitable Assignment conditions leaflet, additional ISA terms and conditions and Declaration.

Account holder's signature: _____ Date: _____

For our use only

Date account opened:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Address ID1:		Address ID2:	
Transfer from account number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Customer number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Signature ID1:	<input type="text"/>
								Signature ID2:	<input type="text"/>