

Individual Savings Account Application Form Tax Year 2020/21

Please read this form carefully in conjunction with our Terms & Conditions

Title: _____ Forenames: _____ Surname: _____

Permanent Residential Address:

Postcode: _____

Date of birth				National Insurance number					
	DD	MM	YYYY						

I declare that, all subscriptions made and to be made belong to me; I am at least 18 years of age; I have not subscribed and will not subscribe more than the overall subscription limit 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 to another stocks and shares ISA in the same tax year that I subscribe to this stocks and shares ISA; and, 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 [ISA manager's name] 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.

I authorise Hedley & Company to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; to make on my behalf any claims to relief from tax in respect of ISA investments; and, on my written request to transfer or pay to me, as the case may be, ISA investments, interest, dividends, rights or other proceeds in respect of such investments or any cash. I agree to the ISA terms and conditions and I declare that this application form has been completed to the best of my knowledge and belief.

Signed Date