

# ISA – Additional Permitted Subscription Allowance (Subsequent Deposit)



All questions must be completed.

Please write clearly in the white spaces with capital letters or cross the boxes.

## 1 Your TSB ISA details

Your branch sort code

Your account number

If you don't currently have an ISA with us you'll need to open an account.

## 2 Your personal details

Title Mr Mrs Miss Ms Other (please specify)

☒☒☒☒

Your last name

Your first names

Your National Insurance number

You can get your National Insurance number from a payslip, P45 or P60 form, a letter from HM Revenue & Customs or DWP, or a pension book.

Your permanent UK address (PO Box and c/o addresses are not acceptable)

Postcode

Your telephone numbers and area dialling codes

Home

Mobile

Work

E-mail address

## 3 Deceased customer details

Title Mr Mrs Miss Ms Other (please specify)

☒☒☒☒

Date of birth

Last name

First names

## 4 Additional Permitted Subscription Allowance Information

I (the investor) wish to subscribe £  from my Additional Permitted Subscription Allowance in respect of the deceased and wish to make my subscription to a TSB Cash ISA specified in Section 1, above.

I enclose a cheque for the above amount

☒

Please transfer payment from my TSB Account

☒

Your branch sort code

Your account number

Please note this account must be the same individual detailed in Section 2 of this form

**Your signature** (only required if payment is by transfer from a TSB Account)

Date

Please remember that if multiple ISAs were held by the deceased their value will be combined to form one APS allowance.

**This section must be completed to confirm the customer named on this application is eligible to make an additional permitted subscription to an ISA in respect of the deceased named on this application.**

I (the investor) declare that:

- I am currently resident in the UK;
- I was married to or in a civil partnership with the deceased at their date of death and have evidence to support this declaration that can be produced on request;
- I am the surviving spouse / civil partner of the deceased;
- I was living with the deceased within the meaning of section 1011 of the Income Tax Act 2007 at the date of the deceased's death (we were not separated under a court order, under a deed of separation, or in circumstances where the marriage or civil partnership had broken down);
- I am aged 16 years of age or over.
- the subscription is made under the provisions of regulation 5DDA of the ISA regulations;
- the subscription is being made within 3 years of the date of death, or if later, 180 days of the completion of the administration of the estate;
- all subscriptions made, and to be made, belong to me.

**I authorise TSB to hold my cash subscriptions and any interest earned on those subscriptions.**

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

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

**Your signature**

Date

### For bank use only

Branch sort code

Branch contact name

ID&V checks completed



Branch stamp

Date

D

D

M

M

Y

Y

Y

Y

### Staff checklist

Please ensure that the customer is given:

TSB Cash ISA Terms and Conditions (**TSB12070**)



**If you'd like this in another format such as large print, Braille or audio please ask in branch.**

Calls may be monitored or recorded.

Tax treatment depends on your individual circumstances and may change.

TSB Bank plc. Registered Office: Henry Duncan House, 120 George Street, Edinburgh EH2 4LH. Registered in Scotland, no. SC95237.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 191240.

TSB Bank plc is covered by the Financial Services Compensation Scheme and the Financial Ombudsman Service.