

Direct ISA application form for Crown employees serving overseas



- Please only use this form if you are a Crown employee serving overseas, or are married to, or in a civil partnership with, a person who performs such duties, and want to open an NS&I Direct ISA.
- Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process your form faster.
- You can only manage our Direct ISA by phone and online. If you aren't yet registered for our online and phone service, we'll register you when we open your account and send you your unique NS&I number and a temporary password to get you started. For security these will arrive separately.

1 Your initial deposit

£ p minimum £1, maximum £20,000 in the 2024/25 tax year

You can pay it by cheque or by switching from another NS&I account (see section 2).

2a Paying by cheque

name of account holder

The cheque must be drawn on a personal account in your name held at a UK bank or building society. Please give the details of this account here.

account number sort code - -

2b OR by switching from another NS&I account

The NS&I account you switch from must be in your name. If you switch from a fixed term investment that's not on sale, you won't be able to switch back.

type of NS&I account switching from

account number or holder's number

If you want to switch from a fixed term investment, there are some restrictions. Please check the customer agreement (terms and conditions) for the investment you're switching from before you apply.

If you are switching from a fixed term investment, do you want to defer until it matures? (You can only defer within 30 days before the maturity date.)

If the amount you are switching will take the balance on your account below the minimum allowed, you must mark that you want to close the account.

yes no **A penalty may apply if you cash in all or part of a fixed term investment before its maturity date.**

If you want to close the account you are switching from, mark here

If you choose to close it, we'll automatically repay any remaining balance after the switch to your nominated bank or building society account on our records. Or, if we don't hold this, the account you nominate in section 4.

3 Your details

Please complete in full.

You must give us your National Insurance number if you have one.

NS&I number If you have an NS&I number, please write it here.

title date of birth (DD MM YYYY)

surname

forenames in full

address

postcode country of residence

nationality

phone number Preferably a mobile so we can reach you more easily.

National Insurance number

email

Please complete the next page ►

4 Your nominated bank or building society account details

We need these details to open a Direct ISA.

Any withdrawals will be paid directly into this account. It must be a personal account in your name, held in the UK, which is able to receive payments by electronic transfer.

If it's an NS&I Direct Saver, just write 'NS&I' in the 'bank/building society' field, complete the 'name in which account is held' field and write the account number in the 'bank reference or building society roll no' field.

bank/building society	<input type="text"/>
name in which account is held	<input type="text"/>
account number	<input type="text"/>
sort code	<input type="text"/> - <input type="text"/> - <input type="text"/>
bank reference or building society roll no (if applicable)	<input type="text"/>

Please be careful when providing your bank details. If you enter the wrong details any payments you make might be delayed, or credited to the wrong account, and may result in a financial loss.

5 Your signature

Declaration

I apply to subscribe for a cash ISA for the tax year 2024/25 and each subsequent year until further notice.

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/made payments, and will not subscribe/make payments, more than the overall subscription/payment limit in total to any combination of permitted ISA types in the same tax year, 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 NS&I 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 NS&I to hold my cash subscriptions and any interest earned on those subscriptions and to make on my behalf any claims to relief from tax in respect of ISA investments.

The information I have provided in this form is correct to the best of my knowledge and belief.

I have had the opportunity to read the customer agreement (terms and conditions) dated 1 July 2024.

signature	<input type="text"/>	date (DD MM YYYY)
		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Your marketing preferences

We may contact you occasionally to promote other NS&I accounts and investments that you might be interested in. If you don't want us to do this, mark the box(es) below:

by post by phone by email online

If you mark the 'online' box, you may still see promotional messages when logged in to our website, but they won't be tailored to you.

You can change your marketing preferences at any time online or by contacting us.

6 What to do next

- Remember to sign and date your form, then send it to:
NS&I, Sunderland SR43 2SB

If you are paying your initial deposit by cheque, make it payable to 'NS&I' and enclose it.