

Application to switch to a Direct ISA



It's easier and faster to switch your account online, simply scan this QR code or go to nsandi.com/DIAS

**NS
&I**

- Please only use this form if you want to switch to an NS&I Direct ISA from another NS&I account.
- Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process your form faster. Make sure you complete all the sections and sign and date it at the end.

- **Want to open a Direct ISA not using money from another NS&I account?**
Apply online at nsandi.com

- 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 2025/26 tax year

2 Switching from another NS&I account

type of NS&I account switching from
account number or holder's number

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.

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.)

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.

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.

3 Your details

Please complete in full

NS&I number

NS&I

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 ►

*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.

bank/building society

name in which account is held

account number

sort code

bank reference or building society roll no (if applicable)

Please be careful when providing your bank details. If you enter the wrong details any payments you make

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.

Declaration

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.

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

date (DD MM YYYY)

--	--	--	--

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