



## Direct ISA inherited allowance account application

- Please note that you can only apply for a Direct ISA inherited allowance account if you are the surviving spouse or civil partner.
- 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.
- **Do not send any money with your initial application.** We can't accept deposits until we have opened the account. Before we open the account, we will contact the manager(s) of the deceased's ISA(s) for further information, including confirmation that none of the inherited allowance has already been used.
- You can only manage our Direct ISA inherited allowance account 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 NS&I number

If you have an NS&I number, please write it here. This will speed up your application.

NS&I																				
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### 2 Your details

Please complete in full. You must give your National Insurance number if you have one.

If you have lived at this address for less than three months, please give your previous address on a separate sheet of paper.

title										date of birth	D	D	M	M	Y	Y	Y	Y		
surname																				
forenames in full																				
address																				
postcode										country of residence										
National Insurance number																				
nationality																				
phone number																				
email address																				

Preferably a mobile so we can reach you more easily.

### 3 Your nominated bank or building society account details

We need these details before we can accept your application.

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

If it's an NS&I Direct Saver or Investment Account 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																				
name in which account is held																				
account number																				
bank reference or building society roll no (if applicable)																				
sort code																				

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

### 4 Deceased's details

title										date of birth	D	D	M	M	Y	Y	Y	Y		
surname																				
forenames in full																				
address at date of death																				
postcode										date of marriage/civil partnership	D	D	M	M	Y	Y	Y	Y		
date of death	D	D	M	M	Y	Y	Y	Y	National Insurance number											

Please complete the next page and sign ►

## 5 Details of the deceased's ISA(s)

*If your spouse or civil partner had more than one ISA, please list all those from which you want to use your inherited allowance with NS&I.*

*If there are more than four different ISAs, please provide the details for each of the others on a separate sheet of paper.*

name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	

## 6 Your signature

### Declaration

I confirm that:

- I am the surviving spouse or 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;
- Any subscriptions I make will be under the provisions of regulation 5DDA of the ISA regulations;
- I will make any subscriptions within three years of the date of death, or if later, 180 days of the completion of the administration of the estate.

I have had the opportunity to read the customer agreement (terms and conditions) dated **6 April 2018**.

signature  date 

D	D	M	M	Y	Y	Y	Y
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### 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.

## 7 What to do next

**Send your completed form to FREEPOST NS&I SALES, enclosing your original certificate of marriage or civil partnership, or a certified copy - see below.**

### Sending certified copies

If you are sending a copy of your certificate of marriage or civil partnership, it must be certified as being a true copy of the original.

Choose one of the following people to certify the copy of your document: a qualified individual who is currently practising in the legal, financial or teaching profession; a doctor or dentist; a minister of a recognised religion; a civil servant or a prison, police or customs officer.

The person you choose to certify the copy must not be related to you by birth or marriage, in a personal relationship with you or live at the same address.

Ask your chosen certifier to write on the copied document:

"I certify that this is a true copy of the original (type of document) belonging to (name)."

Then ask them to sign and date the copied document, clearly print their full name, indicate their occupation or the capacity in which they are providing the certification (eg lawyer, doctor or teacher), provide their work address and daytime telephone number and affix any relevant official stamp where available. Members of professions should also give their institute membership number, if possible.