

Application to switch to a Direct Saver



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



- Please only use this form if you want to switch to an NS&I Direct Saver 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 Saver not using money from another NS&I account?**
Apply online at nsandi.com
- You can only manage our Direct Saver 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 How much do you want to invest? £ p minimum £1, maximum £2 million per person

2 Switching from another NS&I account The NS&I account you switch from must be in your name or the name of the second investor, if applicable. If you switch from a fixed term investment that's not on sale, you won't be able to switch back. Any amount you take out from a Direct ISA may not be able to be paid back in during this tax year.

type of NS&I account switching from

account number or holder's number

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.

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.

3a Your details
Please complete in full

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

title date of birth (this is essential)

surname

forenames in full

address

postcode country of residence

nationality

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

email

If you're resident for tax purposes in any country or territory outside the UK, please complete the fields below.

If you are resident for tax purposes in more than one country or territory outside the UK, please give the tax country and tax identification number for each of the others on a separate sheet of paper.

city of birth

country of birth

tax country

tax identification number

Please complete the next page ▶

3b Second investor's details

Only complete if you are applying for a joint investment

NS&I number	<input type="text" value="NS&I"/>	If the second investor has an NS&I number, please write it here.
title	<input type="text"/>	date of birth (this is essential) <input type="text" value="DDMMYYYY"/>
surname	<input type="text"/>	
forenames in full	<input type="text"/>	
address	<input type="text"/>	
postcode	country of residence	<input type="text"/>
nationality	<input type="text"/>	
phone number	<input type="text"/> Preferably a mobile so we can reach you more easily.	
If the second investor is resident for tax purposes in any country or territory outside the UK, please complete the fields below.		
city of birth	<input type="text"/>	
country of birth	<input type="text"/>	
tax country	<input type="text"/>	
tax identification number	<input type="text"/>	

If the second investor is resident for tax purposes in more than one country or territory outside the UK, please give the tax country and tax identification number for each of the others on a separate sheet of paper.

4 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 or the name of the second investor, held in the UK, which is able to receive payments by electronic transfer.

bank/building society	<input type="text"/>	
name in which account is held	<input type="text"/>	
account number	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(s)

For joint investments both you and the second investor must sign.

Declaration			
I/We have had the opportunity to read the customer agreement (terms and conditions) dated 28 February 2022.			
first investor	<input type="text"/>	date	<input type="text" value="DDMMYYYY"/>
second investor (if applicable)	<input type="text"/>	date	<input type="text" value="DDMMYYYY"/>

6 What to do next

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