

Guaranteed Income Bond application form for an attorney, receiver or deputy



- You need to enclose the original power of attorney or confirmation of your appointment as receiver or deputy, or a certified copy, if you have not already registered one with us that covers you applying for and managing this account. Please see the end of the form for who can certify a copy and how to do so.
- Before we accept an application, we may make electronic checks on the identity and address of the holder and the attorney, receiver or deputy. We may also ask for documentary evidence.
- Where an appointed attorney, receiver or deputy has restricted authority or must act jointly for all transactions with another appointed individual, the NS&I Guaranteed Income Bond cannot be managed online or by phone. In this case all communications and transactions will be by post only.
- Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process the form faster.

1 How much do you want to invest and for which term?

amount £ p minimum £500, maximum £10,000 per person per Issue of a term

term year(s) See the summary box for terms currently on general sale.

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

2a Paying by cheque

The cheque must be drawn on a UK bank or building society account in the holder's name or in your name as attorney, receiver or deputy. Please give the details of this account here.

name of account holder

account number sort code - -

2b OR by switching from another NS&I account

The holder's NS&I account you switch from must be one you are responsible for as the attorney, receiver or deputy. 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 the account below the minimum allowed, you must mark that you want to close the account.

If this is a fixed term investment, do you want to defer the switch until the maturity date? (You can only do this within 30 days of its maturity.)

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 its nominated bank or building society account on our records. Or, if we don't hold this, the account you nominate in section 5.

3 Account holder's details

Please complete in full. The holder must be at least 16. If the account holder has lived at this address for less than three months, please give their previous address on a separate sheet of paper.

NS&I number If the holder has an NS&I number, please write it here.

title date of birth

surname

forenames in full

address

postcode country of residence

nationality

Please complete each page and sign ▶

3 Account holder's details continued

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

If the account holder 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"/>

4 Attorney/receiver/deputy's details

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

If there is more than one attorney, please provide their details on a separate sheet of paper. We will send all correspondence to the person named here.

NS&I number	<input type="text"/>	If you as the attorney, receiver or deputy have an NS&I number, please write it here.
title	<input type="text"/>	date of birth <input type="text"/>
surname	<input type="text"/>	
forenames in full	<input type="text"/>	
address	<input type="text"/>	
postcode	<input type="text"/>	country if not UK <input type="text"/>
nationality	<input type="text"/>	
phone number	<input type="text"/>	Preferably a mobile so we can reach you more easily.
email address	<input type="text"/>	

5 Nominated bank or building society account details

We need these details before we can accept the application.

All income and any withdrawals will be paid directly into this account. It must be an account in the holder's name or in your name as attorney, receiver or deputy, held in the UK, which is able to receive payments by electronic transfer (BACS).

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	<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 the bank details. If you enter the wrong details the income payments and any withdrawals you make might be delayed, or credited to the wrong account, and may result in a financial loss.

**6 Attorney/receiver/
deputy's
signature(s)**

attorney/receiver/
deputy's signature
second attorney/
receiver/deputy's
signature
(if applicable)

Declaration:

I/We have had the opportunity to read the terms and conditions dated **11 June 2018**.

date

date

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:

attorney/receiver/
deputy by post by phone by email online

second attorney/
receiver/deputy
(if applicable) 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. Enclose the original power of attorney or confirmation of your appointment as receiver or deputy, or a certified copy (see the next page for details), unless you have already registered one with us that covers you applying for and managing this account. If you are paying by cheque, make it payable to 'National Savings and Investments' and enclose it.

Thank you

Sending certified copies

If you are sending a copy of the power of attorney, or a copy of the confirmation of your appointment as receiver or deputy, it must be certified as being a true copy of the original.

Who can certify the copy

If it's a copy of the power of attorney choose one of the following people to certify it: the donor (if they still have capacity); a solicitor; a notary public or, unless it is a lasting power of attorney, a stockbroker.

If it's a copy of the confirmation of your appointment as receiver or deputy choose one of the following people to certify it: 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.

How to certify the copy

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.

For NS&I use only

EOI check complete UCI registration checked 1st 2nd Bank check