Investment Account application

ns&i

- Please complete this form if you're over 16 and want to open an NS&I Investment Account in your own name or jointly with one other person aged over 16.
- Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process your form faster.

Want to open an Investment Account on behalf of a child under 16?

You'll need to use a different application form. You can download it from **nsandi.com/forms** or call us and we'll send you one.

Already have an Investment Account?

If you want to deposit more money into your Investment Account, please use the simpler Investment Account deposit form. You can download it from **nsandi.com/forms** or call us and we'll send you one.

1 Your initial deposit

amount £ ☐☐☐☐☐☐☐ ☐☐ p minimum £20, maximum £1 million per person

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

2a Paying by cheque

Give details of the account on which your cheque is drawn.

name of account holder

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 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 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 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 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 5.

3a Your details

Please complete in full. You must be at least 16 to open an NS&I Investment Account.

We will send any correspondence to the address you give here.

title

date of birth D D M M Y Y Y Y

surname

forenames in full

address

postcode

country

nationality

phone number

Preferably a mobile so we can reach you more easily.

email

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.

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

city of birth

country of birth

tax country

tax identification number

3b Your previous address

Only complete if you have lived at your current address for less than three months.

address

postcode

Please complete the next page and sign ▶

4a Second investor's details

Only complete if you are applying for a joint account.

Please complete in full. The second investor must be at least 16.

title

date of birth D D M M Y Y Y Y

surname

forenames in full

address

postcode

country

nationality

phone number

Preferably a mobile so we can reach them more easily.

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.

If they are resident for tax purposes in any country or territory outside the UK, please complete the fields below.

city of birth

country of birth

tax country

tax identification number

4b Second investor's previous address

Only complete if the second investor has lived at their current address for less than three months.

address

postcode

5 Your nominated bank or building society account details

If you want withdrawals paid directly to your bank or building society account, please give its details here. We recommend this for speed and security.

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

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 withdrawals you make might be delayed, or credited to the wrong account, and may result in a financial loss.

6 If there is a second investor, who should sign for withdrawals?

both of us together ☐ either of us individually ☐

7 Your signature(s)

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

Declaration:
I/We have had the opportunity to read the customer agreement (terms and conditions) dated **25 May 2018**.

first investor date D D M M Y Y Y Y

second investor (if applicable) date D D M M Y Y Y Y

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:

first investor	by post ☐	by phone ☐	by email ☐	online ☐
second investor (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.

8 What to do next

Send your completed form to FREEPOST NS&I SALES.
If paying by cheque, make it payable to 'National Savings and Investments'.