

4 APS eligibility declaration

This section must be completed to confirm the investor named on this application is eligible to make an additional permitted subscription to an ISA in respect of the deceased named on this application.

I (the investor) declare that:

- I am the surviving spouse / 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 (we were not separated under a court order, under a deed of separation, or in circumstances where the marriage or civil partnership had broken down)
- The subscription is made under the provisions of regulation SODA of the ISA regulations (additional permitted subscription)
- The subscription is being made:
 - In the case of 'in specie' subscriptions, within 180 days of beneficial ownership passing to me
- I am aged 18 years of age or over
- All subscriptions made, and to be made, belong to me.

I authorise the ISA Manager

- To hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;

And

- To make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA terms and conditions.


I declare that this APS application form has been completed to the best of my knowledge and belief.

Signature: 

Print Name:

Date:

| D | D | M | M | Y | Y | Y | Y |

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