

SCOTTISH WIDOWS PLATFORM ISA - ADDITIONAL PERMITTED SUBSCRIPTION FORM

Please complete this section to confirm your details and your APS eligibility.

1 Investor details

Investor Name:

Investor's permanent residential address:

Postcode:

Date of Birth (DD/MM/YYYY):

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

Email Address:

Scottish Widows Platform ISA reference number:

2 Details of the deceased

Deceased full name:

Permanent residential address of the deceased at their date of death:

Postcode:

Date of Birth (DD/MM/YYYY):

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

National insurance number if known:

Date of Death (DD/MM/YYYY):

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

Date of marriage or civil partnership between the investor and the deceased:

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

Deceased's existing ISA account number(s):

We are committed to ensuring that the way we collect, hold, use and share information about you complies fully with data protection legislation. Before completing this application you should read the data protection policy in our terms and conditions, as this explains how your data will be used.

3 APS allowance subscription information

I (the investor) wish to subscribe £

from my APS allowance in respect of the deceased and wish to make my subscription to my Scottish Widows ISA: In cash

Please be aware that once a subscription to an APS allowance has been made, any future subscriptions under APS allowance MUST be made to this manager and be accompanied by an APS subscription. We may require proof that you are eligible to make an APS payment.

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 (where the deceased died in the period beginning with 3 December 2014 and ending on 5 April 2015, this is treated as occurring on either 6 April 2015, or, the actual date of distribution, whichever is the later), and
 - In the case of cash subscriptions, within 3 years of the date of death, or if later, 180 days of the completion of the administration of the estate (where the deceased died in the period beginning with 3 December 2014 and ending on 5 April 2015, the deceased is treated as dying on 6 April 2015).
- 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 |

SCOTTISH WIDOWS

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