

Fixed Rate Cash ISA

Provided by OneFamily



Application Form – 2019/20 tax year

You can deposit up to £20,000 this tax year into a cash ISA (subject to your combined overall ISA allowance), or transfer in ISAs held with other providers (minimum £500). Please complete this form in **BLOCK CAPITALS** using **BLACK INK**, making sure that **ALL** boxes inside the **RED** borders are completed, otherwise your application could be delayed. All amendments must be initialised.

Please print this form, complete and return by post to: Post Office Money Savings, PO Box 5179, Brighton, BN50 9UY

Section 1 – Personal details

If applying under Power of Attorney please tick here

Title (Mr, Mrs, Miss, etc.) Date of birth

First name

Middle name(s)/Initial(s) (if applicable)

Last name

House/flat number and/or house name

Street

Town

County

Postcode

Home phone number

Mobile phone number

Email address

Occupation

Your place of birth

Your nationality

Do you have a National Insurance (NI) number? Yes No

If yes, enter it here

You should be able to find your NI number on a payslip, P45 form or P60, a letter from HM Revenue & Customs, or a letter from DWP.

Keep in touch so you don't miss out. We wouldn't want you to miss out on offers, exclusive deals and the latest information on products and services that are available to you from across Post Office Limited and its subsidiaries. Our partner, Bank of Ireland (UK) plc would also like your consent to tell you about similar financial products and associated services provided through our partnership, for example, offers of new rates or additional credit where relevant. Our Privacy Policies inform you about how we use your personal details for marketing and what to do if you change your mind. Please read our Privacy Policies which can be found at postoffice.co.uk/privacy and www.bankofirelanduk.com/po-notice.

Please tick the boxes below to indicate how you'd prefer to receive these offers and we'll do the rest.

Post Phone Email Text

Please note that if you have any other Post Office or Post Office/Bank of Ireland UK plc products and have provided a different preference to those provided above, please allow for a short period of time for your latest preference(s) to apply. Information they can provide and the services they can offer me. For Power of Attorney applications, marketing preferences will apply to the Donor only.

Office Use Only

Campaign code:
Transfer 10092
Deposit 10087

Receipt number

To be completed by Post Office branch

Branch code

barcode

Section 2 - Fixed Rate Term (see Summary Box for terms currently available)

Choose term (please tick one box) 1 year 2 years 3years

If you do not select a Fixed rate term above then we will open an ISA with a 1 year fixed rate term for you.

Under 18 or applying with a Power of Attorney? If you are under 18 or applying with a Power of Attorney, you will need to provide documents, including proof of your identity, with your application. For a list of acceptable documents, please phone 0800 169 7500 or see the "How to Apply" section before applying.

Section 3 – Funding your Fixed Rate Cash ISA

Fixed Rate Cash ISA is a single subscription account. One subscription during the current tax year only.

You can open a Fixed Rate Cash ISA either with a subscription or a transfer of another ISA you hold. Please select one of the boxes below. If you would like to open an account with a subscription or a transfer or multiple transfers you will need to complete an application form for each method or transfer.

For each application we receive we will open a separate account.

Transfer:

I would like to transfer an existing ISA (please also make sure you sign and date section 5 and complete section 6).

Subscription: I apply to subscribe to a cash ISA for the tax year beginning 6 April 2019 only.

I would like to make a subscription now of £ , . paid by:

Debit card (only available if applying through a Post Office branch).

Cheque (please make the cheque payable to yourself (e.g. Mrs J Smith) and write your address on the back. Please also provide the sort code and account number in the boxes below).

Sort code - - Account number

Payment from my Post Office Money easy access Savings account Post Office Money account number
(you'll also need to provide us with the details of your account in the boxes provided).

To help us meet anti-money laundering requirements, please detail the source of your subscription above e.g. salary, savings, sale of property, gift etc.

Section 4 – Withdrawals

If you'd like to be able to make withdrawals to a UK personal bank or building society current account, please provide your account details below and we'll set up a Nominated Account for you. You must be named on the account you nominate.

Account holder's name (e.g. John Smith)

Sort code - - Account Number

Interest Payments: By default, all interest due will be paid into your ISA annually. If you wish to have this interest paid into your Nominated Account instead, please tick here

Section 5 – Declaration and your signature

This ISA will be managed under the terms outlined in the Key Features and the Terms and Conditions. Before signing your application, you should read these terms carefully and contact us if there is anything you do not understand.

I authorise Family Equity Plan Limited:

- to hold my cash subscriptions, and any interest earned on those subscriptions;
- to make on my behalf any claims to relief from tax in respect of ISA investments.

If I am subscribing, or intend to subscribe, to this ISA:

I apply to subscribe to a cash ISA for the tax year beginning 6 April 2019 only.

And I declare that:

- All subscriptions made, belong to me;
- I am 16 years of age or over;
- I have not subscribed and will not subscribe more than the overall subscription limit in total to any combination of permitted ISAs in the same tax year;
- I have not subscribed and will not subscribe to another cash ISA in the same tax year that I subscribe to this cash ISA;
- I am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Family Equity Plan Limited if I cease to be so resident or to perform such duties or be married to, or in a registered civil partnership with, a person who performs such duties.

I accept the ISA Terms and Conditions and I declare that this application form has been completed to the best of my knowledge and belief and I confirm that I have received the Deposit Information Sheet.

Signature

Date

Data Protection: Family Equity Plan Limited will hold your personal data in line with our Privacy Notice. The full version is here www.onefamily.com/privacy. It explains your rights as data subject and how we use your data. A copy is also available by writing to OneFamily, 16-17 West Street, Brighton, BN1 2RL; by calling Customer Services on 0345 602 3409 or, by email to customerservices@onefamily.com.

Full details about how your information will be used by Post Office Limited (Post Office) and Bank of Ireland (UK) plc (Bank of Ireland) can be found in the Post Office Privacy Policy and Bank of Ireland Privacy Notice. You will find the summarised Post Office Privacy Policy at the back of the enclosed Key Information Pack. Bank of Ireland's Privacy Notice can be found at <https://www.bankofirelanduk.com/po-notice> and a copy will also be provided in your Welcome Pack.

Anti-money laundering: Family Equity Plan Limited may need to verify the name and address of the applicant to comply with anti-money laundering legislation. We may use credit reference agencies to help us do this and by signing the application form you are agreeing to these checks taking place.

