

Section 2 – Funding your Easy Access Cash ISA

You can open your Easy Access Cash ISA with a subscription and/or a transfer. Please tick the boxes below that apply and make sure you complete the relevant sections of the application form (this will help avoid any delays to us accepting your application). To apply by Debit Card visit your nearest branch.

Transfer:

☐ I would like to transfer an existing ISA (please also make sure you sign and date section 4 and complete section 5).

Subscription: I apply to subscribe to a cash ISA for the tax year beginning 6 April 2023 and each subsequent year until further notice.

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

☐ **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 Easy Access Savings account**
(you'll also need to provide us with the details of your account in the boxes provided).

Account number

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 3 – 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 4 – 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 2023 and each subsequent year until further notice.

And I declare that:

All subscriptions made, and to be 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.

Section 5 – Authority to transfer into an Easy Access Cash ISA

This section will be sent to your existing ISA Manager as evidence of your wish to transfer.

Information about you

Title (Mr, Mrs, Miss, etc.)

Date of birth

First name

Last name

House/flat number/house name

Street

Town and county

Postcode

Home phone number

National Insurance number (if you have one)

Information about the ISA to be transferred

What type of ISA are you transferring? Cash

Stocks and shares

Name of existing ISA provider

Account number

Sort Code (if applicable)

Roll number (if applicable)

Have you paid money into your ISA in the current tax year (e.g. on or after 6 April 2023)?

Yes

No

Transfer details

What would you like to transfer (tick all the boxes that apply):

- ☐ The total value of my ISA (if you choose to transfer the total value of your ISA, it will close)
- ☐ All my current tax year subscriptions (you'll need to transfer these in full, including any interest or growth on those subscriptions)
- ☐ All my previous tax years' subscriptions (including the interest or growth on those subscriptions)
- ☐ A partial amount of £ , . from my previous tax years' subscriptions

What's the estimated value of your transfer? £

Do you have a notice or maturity period on your existing ISA?

Yes

No

If you do, would you like your existing ISA provider to (please tick one of the following boxes):

Wait for the full notice or maturity period to end before going ahead with this transfer.

Go ahead immediately with this transfer; I accept any loss of interest or charges as a result of this.

Transfer authority

- I authorise my existing ISA provider as specified above, to transfer this ISA to Family Equity Plan Ltd.
- I authorise my existing ISA provider to provide Family Equity Plan Ltd with any information, written or non-written, concerning this ISA and to accept any instructions from them relating to this ISA transfer.

Signature

Date