Easy Access Cash ISA Deposit and/or Transfer Application Form

Provided by OneFamily

2023/24 tax year

Deposit up to £20,000 into a cash ISA this tax year (subject to your combined overall ISA allowance), and/or transfer in ISAs held with other providers (minimum £100).

Debit card subscriptions only available if applying in a Post Office branch. 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 initialled.

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

ection 1 – Personal details	S	Occupation
K 1: 1 D (A)		
If applying under Power of Attorney pleas	SE TICK NETE	Your place of birth
Title (Mr, Mrs, Miss, etc.)	Date of birth	Tour place of bird?
	D D M M Y Y Y	
First name		Your nationality
Middle name(s)/Initial(s) (if applicable)		Do you have a National Insurance (NI) number?
		You should be able to find Yes No your NI number on a
		If yes, enter it here payslip, P45 form or P60, a letter from HM Revenue
Last name		& Customs, or a letter from DWP.
House/flat number and/or house name		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
Street		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 or
		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 Polices which can be found at postoffice.co.uk/privacy an www.bankofirelanduk.com/po-notice.
Town		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
County		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 lates!
		preference(s) to apply. information they can provide and the services they can offer me. For Power of Attorne applications, marketing preferences will apply to the Donor only.
Postcode		
Osteode		
		Campaign code: Branch code/FAD code
		10118
Home phone number		Receipt number
Makita akasa sasakas		
Mobile phone number		
Email address		

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.



Section 2 – Funding your Easy Access Cash ISA You can open your Easy Access Cash ISA with a subscription and/or a transfer. Pleas relevant sections of the application form (this will help avoid any delays to us accepting										
Transfer:										
I would like to transfer an existing ISA (please also make sure you sign ar	nd 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 $\ _{\mathbf{\hat{E}}}$	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 accou (you'll also need to provide us with the details of your account in the box										
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 soc	riety 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)	Account holder's name (e.g. John Smith)									
Sort code Account Number	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	I accept the ISA Terms and Conditions and I declare that this application									
and the Terms and Conditions. Before signing your application, you should	form has been completed to the best of my knowledge and belief and I confirm that I have received the Deposit Information Sheet.									
read these terms carefully and contact us if there is anything you do not understand.	·									
I authorise Family Equity Plan Limited:	Signature									
 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	X									
ISA investments. If I am subscribing, or intend to subscribe, to this ISA:	Date									
I apply to subscribe to a cash ISA for the tax year beginning 6 April 2023	D D M M Y Y Y									
and each subsequent year until further notice.	2									
And I declare that: All subscriptions made, and to be made, belong to me;	**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.									
I am 16 years of age or over;	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;									
I have not subscribed and will not subscribe more than the overall	by calling Customer Services on 0345 602 3409 or, by email to customerservices@ onefamily.com.									
subscription limit in total to any combination of permitted ISAs in the same tax year;	Full details about how your information will be used by Post Office Limited									
• I have not subscribed and will not subscribe to another cash ISA in the	(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.									
same tax year that I subscribe to this cash ISA;	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									
 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 	at https://www.bankofirelanduk.com/po-notice and a copy will also be provided in your Welcome Pack.									
(Earnings & Pensions) Act 2003 (Crown employees serving overseas),	Anti-money laundering: Family Equity Plan Limited may need to verify the name									
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	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									
inform Family Equity Plan Limited if I cease to be so resident or to perform	form you are agreeing to these checks taking place.									
such duties or be married to, or in a registered civil partnership with,										

a person who performs such duties.

Section 5 – Authority to trans This section will be sent to your existi									nsfer.								
Information about you																	
Title (Mr, Mrs, Miss, etc.)							Date o	of birth	า								
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 t	ransfer	red															
What type of ISA are you transferring	g? Ca	sh		Sto	ocks a	nd sh	nares										
Name of existing ISA provider																	
Account number																	
Sort Code (if applicable)			_			_											
Roll number (if applicable)																	
Have you paid money into your ISA i	ı the cu	rrent t	tax ye	ar (e.	g. on c	or afte	er 6 A	pril 20	023)?			,	Yes		No		
Transfer details																	
What would you like to transfer (tick	all the	boxes	s that	apply	/):												
1. The total value of my ISA	(if you	choo	se to	transf	fer the	e tota	l valu	e of y	our IS	SA, it	will c	lose)					
2. All my current tax year s	ubscript	tions ((you'll	need	l to tra	ansfe	r thes	e in fu	ull, in	cludir	ng any	/ inter	est o	r grov	wth o	n tho	se sul
3. All my previous tax year	s' subsc	riptio	ns (in	cludin	ng the	inter	est or	grow	/th or	n thos	se suk	scrip	tions)				
4. A partial amount of $ {f f} $,						f	rom r	ny pr	eviou	s tax	years	' subs	cripti	ons
What's the estimated value of your	ransfer	? £				,											
Do you have a notice or maturity pe	riod on v	your e	existin	ng ISA	۱?		Ye	s			No						
If you do, would you like your existing	g ISA p	rovide	er to (pleas	e tick	one o	of the	follov	ving l	boxes	s):						
Wait for the full notice or mat	urity pe	riod to	o end	befor	re goii	ng ah	iead v	vith th	nis tra	ansfe	r.						
Go ahead immediately with the	iis trans	fer; l	accep	t any	loss	of inte	erest (or cha	irges	as a r	esult	of thi	s.				
Transfer authority																	
I authorise my existing ISA prov																	
I authorise my existing ISA prov ISA and to accept any instruction	-			-					any ir	nform	ation	ı, writ	tten c	r nor	ı-writ	tten,	conce
Signature						Dat	G										
Signature X						⊅at	.e										
•																	