

ISA

Subscription form 2020/21

This is an application form to pay a first or additional, one-off subscription to your ISA.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at enquiry@youinvest.co.uk.

Once completed and signed please return the form to us at the address below.

AJ Bell Youinvest
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Checklist

If the payment is by cheque, please ensure that you include it when you return this form to us.

Yes my cheque is included

Important notes

1. All cheques must be made payable to 'AJ Bell Youinvest ISA re (your name)' e.g. AJ Bell Youinvest ISA re John Smith.
2. Your subscription must be paid by cheque drawn on a UK bank or building society account in your name (or in joint names with someone else).

Personal details

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

Date of birth

National Insurance number

Account number

Permanent residential address

Postcode

Country

Telephone number

Email address

Subscription

The additional subscription to be paid to my AJ Bell Youinvest ISA is

£

ISA declaration

I apply to subscribe for a stocks and shares ISA for the tax year 2020/21 and each subsequent year until further notice.

I declare that:

1. I am aged 18 years or over and that I have not subscribed, and will not subscribe, more than the overall subscription limit to a cash ISA, a stocks and shares ISA, an innovative finance ISA and a lifetime ISA in the same tax year.
2. I have not subscribed, and will not subscribe, to another stocks and shares ISA in the same tax year that I subscribe to this stocks and shares ISA.
3. I am resident in the UK for tax purposes or non-resident but performing duties which are treated by virtue of Section 28 of Income Tax (Earnings and Pensions) Act 2003 (Crown employees serving overseas) as performed in the UK or I am married to or in a civil partnership with a person that performs such duties. I will inform AJ Bell Securities Limited if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person that performs such duties.
4. I authorise AJ Bell Securities Limited as ISA manager and/or its nominee
 - a. to hold my cash subscriptions, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; and
 - b. to make on my behalf any claims to relief from tax in respect of ISA investments.

The declaration and information contained in this form is correct to the best of my knowledge and belief and I undertake to notify AJ Bell Youinvest of any changes without delay.

I confirm that I have read and understood the ISA key features and terms and conditions. I agree to be bound by the ISA terms and conditions as may be amended from time to time.

I declare that any monies I may subscribe to the ISA are my own personal money.

Name

Date

Signature