

LIFETIME ISA

Payment form

This form is for making a single payment into your Lifetime ISA. To transfer an existing Stocks and shares, Cash, Lifetime or Help to Buy ISA into your Lifetime ISA, please log in to your account and click 'Transfers' in the 'My account' menu.

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 Lifetime ISA re (your name)' e.g. AJ Bell Youinvest Lifetime ISA re John Smith.
2. Your payment must be paid by cheque drawn on a UK bank or building society account in your name (or in joint names with someone else).
3. You are only allowed to pay into one Lifetime ISA in any tax year and must not pay in more than £4,000. You must also ensure you do not subscribe more than the overall annual ISA allowance of £20,000 across all types of ISAs.

Personal details

Title

Dr / Mr / Mrs / Miss / Ms / Other

Surname

Forename(s)

Account number

Date of birth

Permanent residential address

Postcode

Country

Daytime telephone number

Email address

Payment

The single payment to be made to my Lifetime ISA is

£

Please sign and date this form.

Name

Date

Signature