

**THE F & T INDIVIDUAL SAVINGS ACCOUNT**

**Request for an ADDITIONAL PERMITTED SUBSCRIPTION (APS) allowance valuation**

Please complete this form in BLOCK CAPITALS to request the calculation of an APS valuation.

**Your details (investor)**

Full Name

Permanent residential address

Date of birth

Day	Month	Year		

Do you have a National Insurance Number Yes / No      If yes, please enter it here

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**Details of the deceased**

Full Name

Permanent residential address at their date of death

Date of birth

Day	Month	Year		

Date of death

Day	Month	Year		

Deceased's National Insurance Number

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Date of marriage or civil partnership between investor and deceased

Day	Month	Year		

Deceased's Farley & Thompson ISA account ref:

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Continue overleaf.....

## APS eligibility declaration

This section must be completed to confirm you are eligible to request the calculation and receive disclosure of the Additional Permitted Subscription allowance for the deceased.

### I declare that:

- I am the surviving spouse or civil partner of the deceased;
- I was living with the deceased within the meaning of section 1011 of the Income Tax Act 2007 at the date of the deceased's death (we were not separated under a court order, under a deed of separation, or in circumstances where the marriage or civil partnership had broken down).

Signed .....

Date.....

Full Name .....

We may need to contact you in relation to this request.

To assist us please provide us with your contact details as follows:

Daytime telephone number	
Email address	

### Your next steps:

- Please make sure you have read our information sheet 'Understanding the Additional Permitted Subscription Allowance'.
- You can utilise your APS with Farley & Thompson Stockbrokers in a Stocks & Shares ISA. If you do not already hold an ISA account with us you will need to open one. You will also need to complete an APS application and eligibility declaration form.
- All registration and application forms are available on request or online at [www.farleyandthompson.co.uk](http://www.farleyandthompson.co.uk).
- Alternatively, you can transfer the APS allowance to another ISA provider. If you would like to request your APS allowance is transferred out, please contact your chosen provider directly.