

THE F & T INDIVIDUAL SAVINGS ACCOUNT

Additional Permitted Subscription (APS) Allowance Transfer Authority Form

Please complete this form in BLOCK CAPITALS to request a transfer of an APS allowance to Farley & Thompson. (If you wish to transfer from more than one provider, please complete a separate authority for each company).

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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Farley & Thompson account reference

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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			

Have you notified the provider of the death Yes / No
(If no, you must inform them officially otherwise the transfer will be suspended pending the notification)

Continue overleaf.....

Please be aware that an APS allowance can only be transferred once and only where no subscriptions have already been made under that APS allowance. Once transferred subscriptions may only be made in cash.

To: Deceased ISA manager

Their address

Postcode

Account Reference:

Stocks & shares ISA

OR

Cash ISA (multiple as applicable)

Account No	<input type="text"/>	Sort Code	<input type="text"/>
Account No	<input type="text"/>	Sort Code	<input type="text"/>
Account No	<input type="text"/>	Sort Code	<input type="text"/>

APS eligibility declaration

This section must be completed to confirm you are eligible to transfer an Additional Permitted Subscription allowance in respect of the deceased named on this authority.

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).
- I have not subscribed to and will not subscribe to the Additional Permitted Subscriptions allowance with the existing ISA provider of the deceased in respect of the deceased named on this application.
- I intend to make an Additional permitted Subscription application to Farley & Thompson Stockbrokers

I declare that this APS transfer application form has been completed to the best of my knowledge and belief.

I hereby authorise you to provide Farley & Thompson with any information, written or non-written, concerning the APS allowance and former ISA in respect of myself, the investor, and the deceased and to accept any instruction from them relating to the APS allowance being transferred.

Signed **Date**.....

Full Name

Transfer Acceptance

We, Farley & Thompson Stockbrokers, are willing to accept this APS allowance transfer in line with the investor's instructions above. We confirm that, subject to relevant checks, we are willing to accept an Additional Permitted Subscription application from the investor.

Signed **(Partner)** **Date**.....
 For and on behalf of Farley & Thompson Stockbrokers