

INTERNAL USE ONLY

Exec:

Client Code:

**FARLEY & THOMPSON INDIVIDUAL SAVINGS ACCOUNT  
REQUEST FOR AN ADDITIONAL PERMITTED SUBSCRIPTION (APS)  
ALLOWANCE VALUATION  
(by an individual who is not a client of Farley & Thompson)**

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

**Your details**

Full Name													
Permanent residential address													
Postcode													

Date of Birth			-			-							
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Do you have a National Insurance Number	Yes		No		If yes, please enter here												
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**Details of the deceased**

Full Name													
Permanent residential address													
Postcode													

Date of Birth			-			-							
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Date of Death			-			-							
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Deceased's National Insurance Number													
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Date of marriage or civil partnership between investor and deceased						-									
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Deceased's Farley & Thompson ISA account reference:													
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## 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:		Print Name:		Date:	
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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.
- 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.