

ARNOLD STANSBY & CO LIMITED

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ISA APPLICATION FORM (Stocks & Shares)

Full Name

Permanent Residential Address

Postcode

Date of Birth

Day		Month		Year	

Do you have a National Insurance (NI) Number?

Tick one box

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If Yes you must enter it here

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You should be able to find your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP, or pension order book.

I apply to subscribe for a stocks and shares ISA for the tax year 2019/2020 and each subsequent year until further notice.

I declare that

- all subscriptions made, and to be made, belong to me;
- I am 18 years of age or over;
- I have not subscribed and will not subscribe more than the overall subscription limit (£20,000 for Tax Year 2020/21) in total to a Cash ISA, a stocks and shares ISA, an innovative finance ISA and a lifetime ISA in the same tax year;
- 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, and
- I am resident and ordinarily resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Arnold, Stansby & Co if I cease to be so resident and ordinarily resident or to perform such duties or to be married to, or in a civil partnership with, a person who performs such duties.

I authorise Arnold, Stansby & Co

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; and
- to make on my behalf any claims to relief from tax in respect of ISA investments; and

I agree to the ISA terms and conditions.

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

Signed: _____ **Date:** _____