

BEFORE

Company logo



If you have any questions,
please call us on

08000 000 000

Select Stocks and Shares ISA

Application form 2008/09

You can also apply for a Select ISA online at www.companyname.co.uk/online

Companyname
use only

Please complete in block capitals and black ink

This application will be effective for the tax year in which you apply, and each subsequent year that you make payments to the Select Stocks and Shares ISA until further notice.

Please note you may not subscribe to more than one Stocks and Shares ISA in the same tax year.

1 Personal details



If you are an Companyname customer please provide your Customer Reference Number

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Title

Date of birth

DD	MM	YYYY
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Surname

National Insurance number

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Forename(s)

ISA regulations require that if you have a National Insurance Number you must provide it.

Permanent residential address

Mailing address (if different)

Postcode

Postcode

Phone number

Mother's maiden name (for security purposes)

Email address

2 Cooling off period



Was this product recommended to you by a professional adviser?

Yes

No

If this product was recommended to you by a professional adviser you will have seven days to withdraw your application before we open your ISA. To exercise these rights, please use the Withdrawal Notice provided. No investment purchases will be made by us until the end of the cooling off notice, if it is applicable to you.



This literature is printed on paper made from trees grown in sustainably managed forests.

Companyname Limited, PO Box 999, House, Street, Town, AA1 0ZZ.

Tel +44 (0)1111 222222 Fax +44 (0)1111 333333 Email contact@companyname.co.uk Web www.companyname.co.uk

For security and compliance monitoring purposes telephone calls may be recorded.

Companyname Savings Limited is registered in Scotland No. 999999, registered office as stated above; is authorised and regulated by the Financial Services Authority whose address is 25 The North Colonnade, Canary Wharf, London E14 5HS firm reference number 999999; gives no financial or investment advice.

3 Disclosure



If you wish us to disclose information about any Plans you hold with us to a third party, please give details in this section.

Name	<input type="text"/>	Please send duplicate statements to the person named please tick	<input type="checkbox"/>
Address	<input type="text"/> <input type="text"/> <input type="text"/>		
Postcode	<input type="text"/>	Please state the relationship to you	<input type="text"/>

We will only respond to information requests from this person.

If instructions are to be accepted from anyone other than you, a power of attorney, or letter of authority acceptable to us, must be submitted. Please contact us on 08000 000 000 for a Third Party Authority form.

4 Funding your ISA



Please remember that the maximum you can subscribe to an ISA in any tax year is £7,200. You can invest some or all of this amount in a Stocks and Shares ISA.

You may fund your ISA in the following ways:

- Single lump sum payments.
- Regular Direct Debits.
- Transferring in another ISA.
- Share exchange or the transfer in of employee shares.

Single lump sum payments

How much do you wish to pay?	<input type="text"/>	£	(minimum £50)
By cheque	Please make cheques payable to Companyname Limited		
Tick to confirm you have enclosed your cheque	<input type="checkbox"/>		

Regular payments by Direct Debit

How much do you wish to pay?	<input type="text"/>	£	(minimum £50)
Please give the amount of your regular payment			
On which day of the month?	1st <input type="checkbox"/>	8th <input type="checkbox"/>	Commencing in
(Or next business day)	15th <input type="checkbox"/>	22nd <input type="checkbox"/>	(month/year)
			<input type="text"/>
			<input type="text"/>
Collection	Direct Debits will be automatically collected on a monthly basis.		<input type="checkbox"/>
	If you wish Direct Debits to be collected quarterly, please tick.		

You must complete a Direct Debit instruction before we can take payments as instructed.

Transferring in another ISA

I wish to open my ISA by transferring in another ISA (please tick)	<input type="checkbox"/>	We will not process any transfers unless you enclose the necessary Transfer Request Forms. Please tick to confirm that you have enclosed them.	<input type="checkbox"/>
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You are not required to complete sections 5 and 6. Please now ensure you read the declaration and sign Section 8.

Share exchange or the transfer of employee shares

If you wish to use either of these facilities please contact us or visit www.companyname.co.uk/forms for the appropriate documentation.

6 Income payments



If you have chosen to have income from your investments paid to you, please enter your bank or building society details.

Name and full postal address of your bank or building society	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Name of account holder	<input type="text"/>
Postcode	<input type="text"/>	Branch sort code	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
		Bank or building society account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <small>This must not be the Roll number or Collection Account number.</small>

Please select your preferred payment frequency.

Please pay income to me (please tick)	Monthly <input type="checkbox"/>	Quarterly <input type="checkbox"/>	Commencing in (month)	<input type="text" value="MM"/>
	Half-yearly <input type="checkbox"/>	Yearly <input type="checkbox"/>		

7 Declaration by Companyname Savings



We declare to you that:

- under the Data Protection Act 1998, we are a data controller and will process data about you in performance of our duties as an ISA manager;
- we are an ISA manager authorised by Her Majesty's Revenue & Customs.
- we are authorised by the Financial Services Authority;
- we will hold cash subscriptions, Select Stocks and Shares ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash under a Select Stocks and Shares ISA with us, for your absolute interest and benefit; and
- your Select ISA and your rights under the Select ISA will be governed by the details on this application form, the Terms and Conditions, the Charges Schedule all as may be amended from time to time.

8 Application and Declaration to Companyname and signature



I apply for a Select Stocks and Shares ISA and the first year to which this application relates is the year specified in the date of signing of this application form. I confirm that I have been given and have read the relevant sections of the Terms and Conditions, the Charges Schedule, and any relevant Key Features.

I agree to be bound by this application form and the Terms and Conditions.

I declare that:

- I am 18 years of age or over and that 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 the 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 you 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 have not in the tax year to which this application form applies and shall not subscribe to any other Stocks and Shares ISA, and will not subscribe more than the appropriate overall subscription limit in any year.
- all subscriptions made and to be made, belong to me personally.
- any cash held in the Select Stocks and Shares ISA will be held only for the purpose of investment in qualifying investments in the Select Stocks and Shares ISA.

Signature

- the information given in this application is true and correct to the best of my knowledge and belief and I undertake to inform you without delay of any changes to the particulars given on this application form and any other changes which may affect my eligibility to hold, or subscribe to, this Select Stocks and Shares ISA.
- by completing this application form, I consent to you using my information in the manner described.

I hereby authorise you to:

- hold my cash subscriptions, Select Stocks and Shares ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash under a Select Stocks and Shares ISA with you, subject to the Terms and Conditions and to make on my behalf any claims to relief from tax in respect of ISA investments.
- on my authenticated request, and subject to the Terms and Conditions of the Select Stocks and Shares ISA, to transfer or pay to me, as the case may be, Select Stocks and Shares ISA investments, interest, dividends, rights or proceeds in respect of such investments or any cash.
- contact me by telephone and post to provide me with information on our products, services and events and those from companies within the Companyname group, until such time as I write to the Customer Services Manager requesting you to stop.
- if I do not already have a Personal ID and PIN, issue me with one on acceptance of this form
- act on instructions given under that Personal ID and PIN through Companyname Online and telephone facility.

Date

<input type="text" value="DD"/>	<input type="text" value="MM"/>	<input type="text" value="YYYY"/>
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We may want to e-mail you about Companyname group events products and services, including, special offers, new products and services and investment tools. We need to have your permission to do so. If you wish to benefit from these communications please tick this box.