

# Additional Permitted Subscription (APS) Allowance Request Declaration



To request the value of a deceased account holder's EQi Flexible Stocks & Shares ISA and/or EQi Lifetime ISA, for the purpose of utilising a spousal APS Allowance, please complete and return this form. If you have any questions about this form please contact our Customer Experience Centre on **0345 0700 720**.

**Please complete all the fields in this form (where applicable).**

## Section A: Requestor (Spouse) Details

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Requestor title                      Mr                      Mrs                      Miss                      Ms                      Other

Requestor full name

Requestor date of birth

Day                      Month                      Year

Requestor National Insurance number

Do you have an existing EQi Flexible Stocks & Shares ISA?

Yes

No

If so, what is the account number?

## Section B: Details of the Deceased

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Deceased full name

Postal address of the deceased at their date of death

Deceased date of birth

Day                      Month                      Year

Deceased National Insurance number (if known):

Date of death

Day                      Month                      Year

Deceased account number(s)

## Section C: APS Eligibility Declaration

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**I declare that:**

- I am the surviving spouse / 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 hereby declare that this APS allowance request has been completed to the best of my knowledge and belief.

Signed

Date

Day                      Month                      Year

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## Next Steps

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Please remember to print and sign your form with a wet signature before submission.

Please return this form to: **EQi, PO BOX 4923, Worthing, BN99 6SF**

Once approved, you can make subscriptions to the APS Allowance, in your EQi Flexible Stocks & Shares ISA, by completing and returning an **Additional Permitted Subscription Form**.