

Additional Permitted Subscription (APS) Transfer-In Authority



To request an APS allowance transfer into EQi from another ISA Manager, please complete this form, including the details of your EQi Flexible Stocks & Shares ISA where the subscription is to be made to. If you do not already have a EQi Flexible Stocks & Shares ISA, please return this form together with a EQi Flexible Stocks & Shares ISA Application form.

A separate APS Allowance Transfer form will be required for each ISA Manager.

If you have any questions about completing this form, please contact our Customer Experience Centre on **0345 0700 720**.

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

Section A: Investor Details

Investor full name

Investor postal address

Investor date of birth

Day Month Year

Investor National Insurance number

I have no 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

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

Date of marriage or civil partnership between the investor and the deceased

Day Month Year

Deceased account number(s)

Please note if multiple ISAs were held by the deceased with the ISA manager their value will be combined to form one APS allowance.

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Section C: APS Allowance Transfer Information

Name of deceased's ISA
provider

Address of deceased's ISA
provider

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

Section D: APS Eligibility Declaration

This section must be completed to confirm the investor named on this authority is 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 / 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 subscription 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 Equiniti Financial Services Limited

I authorise the existing ISA provider of the deceased as specified above to provide Equiniti Financial Services Limited with any information, written or non-written, concerning the APS allowance and former ISA in respect of my ISA and that of the deceased and to accept any instruction from them relating to the APS allowance being transferred.

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

Signed

Date

Day

Month

Year

Next Steps

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 the transfer has been initiated, please allow up to 14 days for this to be completed.

You can then subscribe to the APS Allowance using the **Additional Permitted Subscription** form found on the EQi website.