

EQi Flexible Stocks & Shares ISA Declaration



ISA Declaration:

Please read this Declaration carefully

I apply to subscribe for an EQi Flexible Stocks & Shares ISA for the tax year 2023/24 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 to another stocks and shares ISA in the same tax year that I subscribe to this stocks and shares ISA.
- I have not subscribed and will not subscribe more than the overall subscription limit in total to any combination of permitted ISAs in the same tax year.
- I am 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 shall inform EQi if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

I authorise EQi:

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

This service is managed and administered in accordance with the Terms and Conditions which can be viewed on our website or sent to you upon request. This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before completing this form.

I declare that this application form has been completed to the best of my knowledge and belief, and will promptly inform you of any changes in my circumstances.

Sign the form

To sign this form you may provide an electronic signature. You can do this via your Adobe Acrobat Reader DC, or Docusign which is a free of charge service.

Instructions to create an electronic signature are as follows:

1. On Adobe open the file, or on Docusign upload the file
2. In the editor, select sign and draw your signature. Then place your signature in the signed box below
3. Save the document and follow the return instruction in the 'Next Steps' section.

Please note, we cannot accept a typed or written name in the box below. Alternatively, you may print and sign the document.

Signed

Date

Day Month Year