

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

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

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

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

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**.