

# Lifetime ISA

## Instruction to conveyancer



To be allowed to make a charge-free withdrawal from your EQi Lifetime ISA for the purchase of your first residential property, you must provide all of the following information to the conveyancer you have appointed to act on your behalf.

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

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

### Section A: Account details

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Title                                      Mr                                      Mrs                                      Miss                                      Ms                                      Other

First name(s)

Last name

Telephone number

Email address

Postal address

### Section B: Purchase Property Details

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Price of the property you are buying:      £  
(This can not exceed £450,000)

Address of property you are  
buying

### Section C: Conveyancer Details

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Name of conveyancer  
(if known)

Address of conveyancer  
(if known)

Telephone number  
(if known)

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### Section D: Withdrawal Request

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I am buying my first residential property and I want to withdraw the sum of \_\_\_\_\_ £  
from my EQi Lifetime ISA.

I am buying my first residential property and I want to withdraw the full balance  
including the bonus of my EQi Lifetime ISA.

Name of Lifetime ISA Manager \_\_\_\_\_ **EQi**

Address of Lifetime ISA Manager \_\_\_\_\_ **PO Box 4923, Worthing, BN99 6SF**

EQi Lifetime ISA number \_\_\_\_\_

### Section E: Declaration

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**I hereby declare that:**

- I am a first time buyer;
- I will only use the funds I have withdrawn from my EQi Lifetime ISA towards buying my first residential property;
- the funds withdrawn from my EQi Lifetime ISA do not exceed the purchase price of the property;
- the Lifetime ISA(s) from which I am withdrawing funds will have been set up for at least 12 months when the withdrawal is made;
- I have not claimed/I am not claiming a government bonus on funds in a Help to Buy ISA for this purchase or a previous property purchase;
- on completion the property will be my only or main residence, or will become so as soon as it is suitable for use;
- I am purchasing the property as a sole owner or as a joint owner with another individual who may already own a property; or
- I am purchasing a legal interest in land with a loan taken as a charge over the property, or as part of a regulated home purchase plan;
- I am not purchasing the property by means of a 'buy to let' mortgage; or am I a UK Crown employee serving overseas, or their spouse or civil partner, and am purchasing the property by means of a buy to let mortgage, with the intention of occupying the property as my only or main residence on my return to the UK;
- all funds withdrawn from my EQi Lifetime ISA will pass directly from my Lifetime ISA Manager to my conveyancer, who is an eligible conveyancer;
- I have provided the necessary information and declarations to my conveyancer;
- I authorise and have requested my conveyancer to provide all necessary information and declarations to my Lifetime ISA Manager;
- I declare that the information I have provided is true and completed to the best of my knowledge and belief.

**If your house purchase does not proceed within 90 days of your conveyancer receiving the funds, and your conveyancer has not received an extension of time, all funds withdrawn from your Lifetime ISA must be returned to your EQi. If any funds are not repaid into your Lifetime ISA you will be liable to pay a 25% withdrawal charge on the shortfall.**

Signed \_\_\_\_\_

Date \_\_\_\_\_

Day Month Year

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

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