Lifetime ISA
Conveyancer Instruction

When you recieve a declaration from the Lifetime ISA investor who has appointed you to purchase their first residential property, you must declare all of the following information In accordance with the enclosed instruction, from our mutual client, who holds a Lifetime ISA with us, please complete all fields in this form/declaration and return it to us.
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: Client/Lifetime ISA Holder's Details

Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other ☐

First name(s)

Last name

Telephone number

Email address

Postal address

Lifetime ISA number

Amount being withdrawn from the Lifetime ISA of the above named £

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

Address of property your client is buying

Section B: Conveyancer Details

Name of conveyancer

Postal address

Telephone number

Email address

Your unique professional body registration number

Lifetime ISA
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Section C: Withdrawal Request

Name of Stocks & Shares Lifetime ISA Manager	**EQi**
Address of Stocks & Shares Lifetime ISA Manager	**PO Box 4923, Worthing, BN99 6SF**

Account details into which funds should be transferred by EQi.

Name of bank account holder	
Bank/Building Society account number	
Branch sort code	
Reference	

Section D: Declaration

I hereby declare that:

- I am/We are an eligible conveyancer;
- I/We have received the information on this declaration from my client who has declared it to be true and complete to the best of their knowledge;
- I/We will only use the EQi Lifetime ISA funds released towards the purchase price of my client's first residential property, or my client's first share in a residential property;
- If my/our clients purchase does not proceed within 90 days of the date of reciept of my/our client's Lifetime ISA funds, and I/we have not received an extension of time, I/we will return the withdrawn funds in full;
- On completion the property will be used by my/our client as their only or main residence;
- The property will be purchased with a loan taken as a charge over the property excluding a 'buy to let' Mortgage (other than where your client is a UK Crown employee serving overseas, or their spouse or civil partner, and cannot undertake immediate occupation on completion);
- The information I have provided is true and completed to the best of my/our knowledge and belief.

Any funds not repaid will incur a 25% withdrawal charge, which I/we note will be charged by EQi and paid to HM Revenue & Customs.

Signed

Date

Day Month Year

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