Lifetime ISA
Instruction to conveyancer

To be allowed to make a 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

Title	Mr		Mrs		Miss		Ms		Other	
First name(s)										
Last name										
Telephone number										
Email address										

Section B: Purchase Property Details

Price of the property you are buying:	£	
Address of property you are buying		

Section C: Conveyancer Details

Name of conveyancer (if known)	
Address of conveyancer (if known)	
Telephone number (if known)	

Section D: Withdrawal Request

Important: Please sell any investments you need to before submitting this instruction.

Once your investments have been sold and the proceeds are available as cash in your account, you can give us your instruction. This will help avoid delays in processing your request.

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Section D: Withdrawal Request

I am buying my first residential property and want to make a withdrawal from my EQi Lifetime ISA.
Please select one option:

1. Send all funds
Please withdraw all available funds from my EQi Lifetime ISA. ☐

2. Close the account
Please withdraw all funds and close my EQi Lifetime ISA. ☐

3. Amount I wish to raise: £ _____
(For a first home costing more than £450,000, a 20% government withdrawal charge will apply)
Where the 20% withdrawal charge applies this will be taken on the total amount requested e.g. Request for £10,000 will result in £2,000 withdrawal charge and £8,000 being sent to the conveyancer.

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

Section E: Declaration

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- I will only use the funds I have withdrawn from my EQi Lifetime ISA towards buying my first residential property;
- the funds withdrawn from my EQi Lifetime ISA do not exceed the purchase price of the property;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 governmant 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 I am 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.
  Where Lifetime ISA funds are used towards the purchase of a first home costing more than £450,000, a 20% government withdrawal charge will apply; the standard 25% charge continues to apply to other non-qualifying withdrawals.

Signed _____ Date ____ ____ ____
Day Month Year

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

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