

Flexible Stocks & Shares ISA Cancellation



Please ensure you complete this form if you wish to cancel your EQi Flexible Stocks & Shares ISA agreement with us within the cancellation period for the tax year 2024/25 and follow the return instructions below.

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

Section A: Personal Details

First name(s)

Last name

Account number

Section B: Declaration

I hereby give notice to EQi that I have decided not to proceed with this agreement. I require the return of any money paid to you or your agent in connection with the agreement and which I am entitled to have returned in accordance with the notes set out below.

I understand that no administration fees will be payable, but any dealing costs incurred in buying and selling any investments in accordance with the instructions which I have given will still be payable. I will receive any profit (after the deduction of any dealing costs) arising as a result of selling investments purchased within the ISA, but I will be responsible for any loss arising from such sales.

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 Section C.

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



Section C: Cancellation rights

This notice relates to the ISA agreement you have entered into which may be identified by the account number on the accompanying letter. You have a legal right to change your mind about continuing with the ISA.

1. Your right to cancel your ISA

If you wish to cancel your ISA you should complete this form and send it to the address below. You must post it on or before the 14th day after the day on which you receive this notice.

2. The financial consequences of cancellation

EQi will repay any money you have subscribed to your ISA, without deduction of any ISA administration fees. However, any dealing costs incurred in buying or selling any investments in accordance with your instruction will still be payable by you and will be deducted.

You will receive any profit (after deducting dealing costs) arising as a result of selling investments purchased within your ISA, and you will be responsible for any loss arising from such sales.

If you cancel your ISA within the **14 day period**, you will still be able to subscribe to another Stocks & Shares ISA in the same tax year.

To return your form, please send to forms@eqi.co.uk, this and all related documents must be received from the registered email on your EQi account. Forms received from an unregistered email account will not be actioned, to assist with this please login to your account and ensure all contact details are correct.

Alternatively you can post the form to: **EQi, PO BOX 4923, Worthing, BN99 6SF**