

Lifetime ISA Cancellation



Please ensure you complete this form if you wish to cancel your EQi Lifetime ISA agreement with us and return 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 EQi Lifetime 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 Lifetime 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 Lifetime ISA.

Your right to cancel your Lifetime ISA

Return this form to us on or before the 30th day after the day on which you opened the Lifetime ISA with us.

If you cancel your Lifetime ISA within the 30 day period, you will not incur a government withdrawal charge and you will still be able to subscribe to another Lifetime 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**