Flexible Stocks & Shares ISA Subscription



If you have not subscribed to your EQi Flexible Stocks & Shares ISA in this or the previous tax year (the tax year runs from 6 April-5 April), then you can use this simplified form. Please complete this form if you already have an EQi Flexible Stocks & Shares ISA.

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

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

of the notice of acquisition. (You must transfer shares from a share incentive plan into an ISA within 90 days after the shares

Please note: Any remaining shares over the subscription limit will be transferred to your Dealing Account

ceased to be subject to plan).

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Section A: Your Personal Details						
Title	Mr	Mrs	Miss	Ms	Othe	r
First name(s)						
Last name						
Account number						
Section B: F	unding your ISA	4				
box(es). If you wou	e way you would like to Ild prefer to fund your IS vely call our Customer E	A using your debit	card, please lo	g on to your acc	ount and mak	e the payment
The maximum sub	scription for a stocks ar of permitted ISAs).	nd shares ISA is £20),000 for the tax	x year 2024/25 (le	ess any contri	butions made to
A) Cheque from an EQi)	account in your own na	ıme (made payable	e to		£	
B) Transferring mo	ney from your Dealing A	Account	Singl	e payment amou	£	ar payment amount
If you wish to m on either the 1st	inated bank account ake regular payments t t or the 15th of each mo ease select your preferr	nth or the following	ed £	nent date	£	15th
D) Transfer shares	from an eligible scheme	e:				
	the shares within 90 da nclude a CREST Transfel					
Please provide a that the shares h	d share option scheme copy of the Exercise of ave been transferred fr er the shares into an ISA n date).	om this type of sch	orove neme.	ber of shares	£	
• a share incentive	e plan (SIP)		Numl	ber of shares		
Please provide a been awarded fr	copy of the award not ree, partnership and/or	matching shares.	lf		£	

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Section C: Enclosures

Use this checklist to confirm you have enclosed all supporting documents to subscribe shares or certificates.

Maturity Notice

Please ensure that you have enclosed all required maturity or SIP Share documents.

CREST Transfer Form

Please ensure that you have enclosed a completed CREST Transfer Form for your ISA.

Please note: we require the originals of all supporting documents be sent to the postal address below.

Section D: Declaration and Authority

Please read this section carefully before signing the Declaration

I apply to subscribe for EQi Flexible Stocks & Shares ISA for the tax year 2024/25 and each subsequent year until further notice.

I declare that:

- · All subscriptions made, and to be made, belong to me.
- I am 18 years of age or over.
- I have not subscribed, and will not subscribe, to more than the overall ISA subscription limit total in the same tax year.
- I am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of the Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I shall inform EQi if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
- I agree to the EQi Flexible Stocks & Shares ISA Terms & Conditions.

I authorise EQi:

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash;
- to make on my behalf any claims to relief from tax in respect of ISA investments.
- This service is managed and administered in accordance with the Terms and Conditions which can be viewed on our website or sent to you upon request. This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before completing this form.
- I declare that this application form has been completed to the best of my knowledge and belief, and will promptly inform you of any changes in my circumstances.

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 below.

Please note, we cannot accept a typed or written name in the box below. Alternatively, you may print and sign the document.

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Section D: (continued)						
Signed	Date					

Month

Day

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