

Declaration – additional permitted subscription

Nucleus client relations, PO BOX 26968, Glasgow G2 9DY.

Please complete and sign this form before sending it to us at the above address. If any party signs but fails to date a signature, the date that Nucleus receives the Declaration will be deemed to be the date that the signing party signed the agreement.

Client details

Name

Town/City

Account number

Postcode

National insurance number

Date of marriage or civil partnership

Please note if multiple Isas were held by the deceased with the Isa provider their value will be combined to form one APS allowance.

Deceased's details

Name

Value of APS (at date of death or date when Isa(s) was closed)

£

Account number (s)

Nucleus declaration – additional permitted subscription

APS Allowance subscription information

Date of birth

I wish to subscribe

£

Date of death

from my APS allowance in respect of the deceased

National insurance number

I declare that

Address 1

- I am the surviving spouse/civil partner of the deceased
- I was living with the deceased within the meaning of section 1011 of the Income Tax Act 2007 at the date of the deceased's death (we were not separated under a court order, under a deed of separation, or in circumstances where the marriage or civil partnership had broken down)
- This subscription is made under the provisions of regulation 5DDA of the Isa regulations (additional permitted subscription)
- I am aged 18 years or over
- All subscriptions made, and to be made, belong to me

Address 2

Address 3

Declaration – additional permitted subscription

Please tick as appropriate

This subscription is being made by way of

In specie transfers (movement of assets) – within 180 days of beneficial ownership passing to the surviving spouse/civil partner (only allowed where the APS allowance is being transferred to the same Isa manager the deceased's Isa was held with);

or

Cash subscriptions – within 3 years of the date of death, or if later, 180 days of the completion of the administration of the estate.

Please note this Declaration must be submitted each time the additional permitted subscription is used.

Signature

I hereby declare that the contents of this declaration are true and accurate and have been completed to the best of my knowledge, information and belief.

I acknowledge that it is a serious offence to make false statements. False statements made in this declaration could lead to prosecution.

Signed (we require a handwritten signature)

Date