

Cash ISA application/reactivation for the tax year 2022/2023



firstdirect.com
03 456 100 100

Please ensure you return all the pages of this application form to first direct, 40 Wakefield Road, Leeds LS98 1FD

For more details on how we use your information please see our Privacy Notice Overview section which can be found at firstdirect.com/privacy

Please ensure you sign and date the declaration on page 3 of this form.

Personal details

It is important that you complete this form to enable us to process your application. Please complete in black ink and use **BLOCK CAPITALS**. In other cases please tick clearly the boxes required.

If you need any assistance with the completion of your application call us on **03 456 100 100†**.

Title

Forename(s)

Surname

Date of birth (dd/mm/yyyy)

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Full permanent address

Postcode

Do you have a National Insurance Number?

If 'Yes', please add it to the box provided.

Yes

No

National Insurance Number (eg AB123456C)

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You should be able to find your National Insurance Number on your payslip, form P45 or P60, a letter from HM Revenue & Customs or a letter from the DWP.

A temporary National Insurance Number may be issued, for example where yours has been lost, or if you have recently returned from a period abroad. These are usually issued in the format TN999999M or 99Y99999. If you have a temporary National Insurance Number, please complete this form as if you do not have a National Insurance Number.

If you'd like to reactivate your ISA, please include the sort code and account number here:

Sort code

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ISA number

Payments

You can make lump sum and/or regular payments into your Cash ISA. The total of all payments to any combination of any permitted ISAs must not exceed the current tax year annual allowance.

Lump sum payment

Amount

Transfer from **first direct** sort code

account number

or enclose a cheque made payable to **first direct**.

Regular payment from your 1st Account

Amount

Account to debit

Sort code

Account number

Date of first payment (dd/mm/yyyy)

Frequency (tick one)

Monthly

Annually

You can make regular payments from an account not held at **first direct** by arrangement with the account holding bank.

Power of Attorney

If you are not the applicant, but are signing on behalf of the applicant, please enter your name in the box below and describe the legal capacity in which you are signing this form.

Name

If you are signing this application under a Power of Attorney or other Authority for an investor who is incapacitated, please indicate the nature of the incapacity:

Mental

Physical

continued...on the next page, where you'll find a declaration and agreement to sign.

Declaration and Agreement

Please do not strike through any wording on this page as this may void this application.

I apply to subscribe to a **first direct** Cash ISA for the tax year commencing 6 April 2022 and each subsequent tax year until further notice. (This election simply makes it easy for you to subscribe to each subsequent tax year's ISA - it's not a commitment on your part to subscribe each year.)

I declare that:

- I am 18 years of age or over
- All subscriptions made, and to be made, belong to me
- 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 and 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 will inform **first direct** if I cease to be so resident or to perform such duties or be married to, or in civil partnership with, a person who performs such duties
- I have not subscribed and will not subscribe more than the overall subscription limit in total to any combination of permitted ISAs in the same tax year
- I have not subscribed and will not subscribe to another Cash ISA in the same tax year as I subscribe to this Cash ISA
- I've received a copy of the Cash ISA Key Facts and I agree to the Cash ISA Terms and Conditions
- Any information provided in respect of this application has been completed to the best of my knowledge and belief and I will notify **first direct** without delay of any changes in my circumstances affecting any of the information given in this application. Where information I have provided relates to other people, I declare I am authorised by them to disclose that information and to accept the terms on their behalf
- I have received a copy of the UK Financial Services Compensation Scheme (FSCS) Information Sheet and Exclusions List.

I authorise first direct:

- To hold my cash subscription and any interest earned by those subscriptions
- To make on my behalf, any claims to relief from tax in respect of ISA investments.

Signed

Date (dd/mm/yyyy)

†Text-phone **03 456 100 147** or if calling from abroad **+44 113 234 5678** (Text Relay **+44 151 494 1260**).

For more information on contacting us via BSL video relay service visit [firstdirect.com/contact-us](https://www.firstdirect.com/contact-us)

Because we want to make sure we're doing a good job, calls may be monitored and/or recorded, we hope you don't mind.

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