

2023/24 ISA Application

Please use this form to apply for an ISA through our Online Investment Service.

This application is subject to the Online Investment Service Terms of Business, which you should read carefully and ensure you understand fully before completing and signing this form. Please talk to us if there is anything in the Terms or this application which you do not understand or about which you require further clarification.

The Bestinvest Online Investment Service is an online service and therefore you should choose your new investments once the cash you are subscribing has been paid into your ISA. If you are new to the Bestinvest Online Investment Service, we will send you an email letting you know how to set up your password and log in to your account.

Need help in completing this form? Call us on **020 7189 9999**.

Please complete all sections of this form in **BLOCK CAPITALS**

1. Your details Please complete all sections

Title (Mr/Mrs/Miss/Ms/Other)

Surname

First Names (in full)

Permanent Residential Address

Postcode

Date of Birth

Email (you must have an email address to join the Bestinvest Online Investment Service)

Telephone Number

Country of Birth

Citizenship

Nationality

Additional Citizenship (if applicable)

Additional Nationality (if applicable)

Client Number (existing Bestinvest clients only)

National Insurance Number

Are you tax resident in a country other than the UK?

If you have ticked 'Yes' which country?

If you have ticked 'Yes' please provide your Tax Identification Number (TIN)

☐

Yes

☐

No

Is the United Kingdom your main tax residency

☐

Yes

☐

No

If you do not have a TIN please explain why

2. Your investment

I would like to fund my account using debit card or invest by monthly savings, which I will set up myself online once this form has been processed.

- Please do not attempt to process any payments until your activation email has been received. If you require any further assistance in relation to payments please do not hesitate to contact a member of the New Business Team on 020 7189 2400.

The maximum investment for the 2023/24 tax year is £20,000.

3. Your documentation

Only complete *this* section if you are new to the Bestinvest

As a Bestinvest client you have a choice about how you receive your contract notes and statements. Please indicate your choice by ticking one of the following options.

- ☐ Online only (free of charge) ☐ Online and by post (a charge of £37.50 plus VAT per quarter will be made, which covers all Bestinvest Online Investment Service accounts you may have)

4. Bank details

Name(s) of account holder(s)

Bank/building society account number

Branch sort code

Name of Bank

5. Marketing communications

We'd like to send you some occasional updates, such as news, investment guides and invitations to events. You can unsubscribe at any time and you'll find full details of how we use and secure your personal information in our privacy notice

www.bestinvest.co.uk/help/privacy-notice

If you would rather not hear from us please tick the relevant box below.

Email ☐ Phone ☐ Post ☐

5. Declaration & signature

I declare that:

- 1. I confirm that I have received and agree to the Bestinvest Online Investment Service Terms of Business (incorporating the ISA Terms and Conditions); I also confirm that I have been given the opportunity to read the Terms and the Key Facts, and that I have had any questions arising answered satisfactorily;
- 2. The information given in this application is, to the best of my knowledge, correct and I will inform Evelyn Partners Investment Management Services Limited ("Bestinvest") immediately of any changes to these details;
- 3. All subscriptions made, and to be made, belong to me;
- 4. I am 18 years of age or over;
- 5. I have not subscribed and will not subscribe more than the overall annual limit to a cash ISA, a Stocks & Shares ISA, an innovative finance ISA and a lifetime ISA in the same tax year;
- 6. I have not subscribed and will not subscribe to another Stocks & Shares ISA in the same tax year that I subscribe to this Stocks & Shares ISA. Alternatively, if I have already subscribed to another Stocks & Shares ISA in the current tax year, I am transferring that account and my remaining ISA allowance to Bestinvest in full;
- 7. I am a resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of 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 will inform Bestinvest 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;
- 8. I confirm I have declared all my citizenships, nationalities and tax residence(s) to Bestinvest on this application form or by telephone as required. I understand this is required for Bestinvest to comply with UK and international tax legislation;

I authorise Evelyn Partners Investment Management Services Limited to:

- Hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash
- Make on my behalf any claims to relief from tax in respect of ISA investments

By signing below I agree to the above declaration

Name

X

PLEASE SIGN HERE

X

Date

D

D

M

M

Y

Y

Y

Y

Once completed, please submit by either:

- **Signing this form digitally** using Adobe sign.
- **Printing out and posting** to Online Investment Service, Bestinvest, Royal Liver Building, Pier Head, Liverpool L3 1NY.
- **Scanning the form and emailing** to best@bestinvest.co.uk