

APS Transfer Authority Form

Please ensure all boxes are completed in full, using black ink and BLOCK CAPITALS and sign as required. Incomplete or incorrect forms will cause a delay and may have to be returned to you and could also result in your application being rejected.

Investor Details			
Title: (Mr/Mrs/Miss/Ms/Other)		Permanent residential address:	
First name(s):			
Surname:			
Date of birth: (dd-mm-yyyy)			
Telephone Number: (Daytime)		Postcode:	
Telephone Number: (Evening)		Occupation:	
National Insurance No: (or confirmation that you do not have one)	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	Estimated Annual Income:	

Details of the Deceased			
Title: (Mr/Mrs/Miss/Ms/Other)		National Insurance No: (if known)	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
First name(s):		Permanent residential address at their date of death:	
Surname:			
Date of birth: (dd-mm-yyyy)			
Date of marriage or civil partnership between the investor and the deceased:			
Date of death: (dd-mm-yyyy)		Postcode:	

Please note if multiple ISAs were held by the deceased with the ISA manager their value will be combined to form one APS allowance.

APS Allowance Transfer Information	
Name and address of deceased's ISA manager:	<div><div></div><div></div><div></div><div></div><div></div></div>
Existing ISA number(s):	

Please be aware that an APS limit/allowance can only be transferred once and only where no subscriptions have been made under that APS limit/allowance. Once transferred, subscriptions may only be made in cash.

APS Eligibility Declaration	
<p>This section must be completed to confirm the investor named on this authority is eligible to transfer an Additional Permitted Subscription limit/allowance in respect of the deceased named on this authority.</p> <p>I (the investor) declare that:</p> <ul style="list-style-type: none">I am the surviving spouse / civil partner of the deceasedI 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)I have not subscribed to and will not subscribe to the Additional Permitted Subscription allowance with the existing ISA provider of the deceased in respect of the deceased named on this applicationI intend to make an Additional Permitted Subscription application to the West Brom	

Transfer Authority	
<p>I authorise the existing ISA provider of the deceased as specified above to provide the West Brom with any information, written or non-written, concerning the APS allowance and former ISA in respect of myself (the investor) and the deceased and to accept any instruction from them relating to the APS allowance being transferred.</p> <p>I declare that this APS transfer application form has been completed to the best of my knowledge and belief.</p>	
Signature:	Date:

Transfer acceptance (your new ISA provider fills this part in)

We, the West Brom are willing to accept this APS limit/allowance transfer in line with the investor's instructions above. We confirm that, subject to relevant checks, we are willing to accept an Additional Permitted Subscription application from the investor.

Name of new ISA Manager:

Please send your completed Letter of Authority to Transfer form, together with your account application form to FREEPOST THE WEST BROM. (Please write the address exactly like this, all in upper case and on one line. You don't need to use a stamp. Please note: Royal Mail delivers Freepost as second class mail.)

Calls and electronic communications may be monitored and/or recorded for your security and may be used for training purposes. Your confidentiality will be maintained.

The West Brom is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority. Register no. 104877. 'the West Brom' is a trading name of West Bromwich Building Society.

Head Office: 2 Providence Place, West Bromwich B70 8AF. Visit our website: www.westbrom.co.uk

A14346-04/24-01

