

This section must be completed to confirm the customer named on this application is eligible to make an additional permitted subscription to an ISA in respect of the deceased named on this application.

I (the investor) declare that:

- I am currently resident in the UK;
- I was married to or in a civil partnership with the deceased at their date of death and have evidence to support this declaration that can be produced on request;
- 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);
- I am aged 16 years of age or over.
- the subscription is made under the provisions of regulation 5DDA of the ISA regulations;
- the subscription is being made within 3 years of the date of death, or if later, 180 days of the completion of the administration of the estate;
- all subscriptions made, and to be made, belong to me.

I authorise the existing ISA provider as specified above to provide TSB 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.

I agree to the ISA terms and conditions.

I declare that this Additional Permitted Subscription transfer application form has been completed to the best of my knowledge and belief.

Your signature

Date

Transfer Acceptance

We, TSB are willing to accept this Additional Permitted Subscription 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 and correspondence address of new ISA Manager

ISA Team, TSB Bank plc,
PO Box 453, Mitcheldean, GL4 9LR

For bank use only

Branch sort code

Branch colleague name

Branch stamp

Date

Staff checklist

Please ensure that the customer is given:

TSB Cash ISA Terms and Conditions (**TSB12070**)



If you'd like this in another format such as large print, Braille or audio please ask in branch.

Calls may be monitored or recorded.

Tax treatment depends on your individual circumstances and may change.

TSB Bank plc. Registered Office: Henry Duncan House, 120 George Street, Edinburgh EH2 4LH. Registered in Scotland, no. SC95237.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 191240.

TSB Bank plc is covered by the Financial Services Compensation Scheme and the Financial Ombudsman Service.