

Buckinghamshire Building Society

ISA Declaration

I declare that:

- I am 18 years of age or over
- All subscriptions made, and to be made, belong to me
- I have not subscribed, and will not subscribe to, more than the overall subscription limit total in the same tax year.
- I am a resident in the United Kingdom for tax purposes or, if not resident either perform duties which, by virtue of Section 28 of 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 **Buckinghamshire Building Society** 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

I authorise Buckinghamshire Building Society:

- To hold my Cash ISA subscriptions, any interest earned on these subscriptions and any rights or proceeds, in respect of these investments
- To make on my behalf any claims to relief from tax in respect of ISA investments

I declare that this declaration form has been completed to the best of my knowledge and belief and I confirm I have read, understood and agree to the ISA Terms and Conditions

Buckinghamshire Building Society

ISA Terms and Conditions

In addition to our General Terms and Conditions, the following ISA conditions apply. If there is a conflict, the ISA conditions will take priority.

- The ISA investments will be, and must remain in, the beneficial ownership of the investor and must not be used as security for a loan.
- The ISA manager will satisfy themselves that any person to whom they delegate any of their functions or responsibilities under the terms agreed with the investor is competent to carry out those functions and responsibilities.
- The ISA manager must notify the investor if, by reason of any failure to satisfy the provisions of the ISA regulations, an ISA has, or will, become void.
- On the instructions of the investor and within the time stipulated by the investor, subject to the withdrawal conditions of the account, an ISA, or part of an ISA, shall be transferred to another ISA manager within 15 working days of the investor's request in accordance with the ISA regulations relating to transfers.
- On receipt of a transfer instruction from the new ISA manager, we will send the funds and information to the new manager within 5 business days of the date of receipt.
- On receipt of a transfer instruction from the investor, we will send it to the old ISA manager, together with confirmation that we will accept the transfer, within 5 business days of the date of receipt. On receipt of the funds from the old ISA manager, we will credit the funds to the account within 3 business days.

In the event of death, the account will be designated 'a continuing account of a deceased investor' and the tax advantages will remain until the status of the account changes. The balance of your Cash ISA can be transferred to your spouse or civil partner's ISA allowance. This is known as an Additional Permitted Subscription (APS). We accept APS allowances unless otherwise specified on the specific product terms and conditions. Further information can be found at www.gov.uk/individual-savings-accounts