

Direct ISA application form for an attorney, receiver or deputy

NS
&I

- We require the holder to sign in conjunction with the attorney, receiver or deputy, unless there is a physical or mental incapacity. You also need to enclose the original power of attorney or confirmation of your appointment as receiver or deputy, or a certified copy, if you have not already registered one with us that covers you applying for and managing this account. Please see the end of the form for who can certify a copy and how to do so.
- Before we accept an application, we may make electronic checks on the identity and address of the holder and the attorney, receiver or deputy. We may also ask for documentary evidence.
- Where an appointed attorney, receiver or deputy has restricted authority or must act jointly for all transactions with another appointed individual, the NS&I Direct ISA cannot be managed online or by phone. In this case all communications and transactions will be by post only.
- Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process the form faster.

1 Initial deposit

£ p minimum £1, maximum £20,000 in the 2025/26 tax year

You can pay it by cheque or by switching from another NS&I account (see section 2).

2a Paying by cheque

The cheque must be drawn on a UK bank or building society account in the holder's name or in your name as attorney, receiver or deputy. Please give the details of this account here.

name of account holder

account number sort code - -

2b OR by switching from another NS&I account

type of NS&I account switching from

account number or holder's number

The NS&I account you switch from must be in your name. If you switch from a fixed term investment that's not on sale, you won't be able to switch back.

If the amount you are switching will take the balance on your account below the minimum allowed, you must mark that you want to close the account.

If you want to switch from a fixed term investment, there are some restrictions. Please check the customer agreement (terms and conditions) for the investment you're switching from before you apply.

If you are switching from a fixed term investment, do you want to defer until it matures? (You can only defer within 30 days before the maturity date.)

yes ☐ no ☐ **A penalty may apply if you cash in all or part of a fixed term investment before its maturity date.**

If you want to close the account you are switching from, mark here ☐

If you choose to close it, we'll automatically repay any remaining balance after the switch to your nominated bank or building society account on our records. Or, if we don't hold this, the account you nominate in section 5.

3 Account holder's details

Please complete in full.
We need the account holder's date of birth as they must be at least 16 and resident in the UK for tax purposes to open an NS&I Direct ISA.

If the account holder has lived at this address for less than three months, please give their previous address on a separate sheet of paper

You must give the holder's National Insurance number if they have one.

NS&I number If the holder has an NS&I number, please write it here.

title date of birth (DD MM YYYY)

surname

forenames in full

address

postcode country of residence

nationality

National Insurance number

Please complete all pages ►

7 What to do next

- Remember to sign and date your form, then send it to:
NS&I, Sunderland SR43 2SB

Please enclose the original Power of Attorney or confirmation of your appointment as Deputy, or a certified copy (see below for details), unless you have already registered one with us that covers you applying for and managing this account.

If you are paying the initial deposit by cheque, make it payable to 'NS&I' and enclose it.

Thank you

Declaration

I apply to subscribe for a cash ISA for the tax year 2025/26 and each subsequent year until further notice.

I declare that:

- all subscriptions made, and to be made, belong to me;
- I am 18 years of age or over;
- I have not subscribed/made payments, and will not subscribe/make payments, more than the overall subscription/payment limit in total to any combination of permitted ISA types in the same tax year, and
- 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 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 NS&I 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 NS&I to hold my cash subscriptions and any interest earned on those subscriptions and to make on my behalf any claims to relief from tax in respect of ISA investments.

The information I have provided in this form is correct to the best of my knowledge and belief.

I have had the opportunity to read the customer agreement (terms and conditions) dated **1 July 2024**.

Sending a certified copy

If you are sending a photocopy of the Power of Attorney or confirmation of your appointment as Deputy, it must be certified at the end of each page as being a true and complete copy of the original.

Who can certify the copy

The copy of the Power of Attorney must be certified by one of the following people: The Donor (if they still have capacity); a solicitor; a chartered legal executive; a notary public or, unless it is a Lasting Power of Attorney, a stockbroker.

The copy of the confirmation of your appointment as Deputy can be certified by any of the following people:

A qualified individual who is currently practising in the legal, financial or teaching profession, doctor or dentist, minister of a recognised religion, civil servant, prison, police or customs officer.

The certifier must not be related to you by birth or marriage, in a personal relationship with you or live at the same address.

How to certify the copy

The certifier must write at the end of each page of the copy: "I certify that this is a true copy of the original [type of document] belonging to [name]."

Then the certifier must sign and date the copy, print their full name under their signature (affixing any relevant official stamp) and add their occupation, address and daytime phone number. If they have lived at that address for less than three months, they should also give their previous address. Members of professions should also give their institute membership number, if possible. Under anti-money laundering legislation we may verify their identity using this information.

For NS&I use only



EOI check
complete

UCI registration checked

1st



2nd



Bank check