

Direct ISA inherited allowance account application

- Please note that you can only apply for a Direct ISA inherited allowance account if you are the surviving spouse or civil partner.
- Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process your form faster. Make sure you complete all the sections and sign and date it at the end.
- **Do not send any money with your initial application.** We can't accept deposits until we have opened the account. Before we open the account, we will contact the manager(s) of the deceased's ISA(s) for further information, including confirmation that none of the inherited allowance has already been used.
- You can only manage our Direct ISA inherited allowance account by phone and online. If you aren't yet registered for our online and phone service, we'll register you when we open your account and send you your unique NS&I number and a temporary password to get you started. For security these will arrive separately.

1 Your NS&I number

If you have an NS&I number, please write it here. This will speed up your application.

[illegible]

2 Your details

Please complete in full.
You must give your National Insurance number if you have one.

Full name (Please write your full name in full)

title

date of birth (DD MM YYYY)

surname

forenames in full

address

postcode

country of residence

nationality

phone number

Preferably a mobile so we can reach you more easily.

National Insurance number

email

3 Nominated bank or building society account details

*We need these details
before we can accept
your application.*

Any withdrawals will be paid directly into this account. It must be a personal account in your name held in the UK, which is able to receive payments by electronic transfer.

If it's an NS&I Direct Saver, just write 'NS&I' in the 'bank/building society' field, complete the 'name in which account is held' field and write the account number in the 'bank reference or building society roll no' field.

bank/building society	<input type="text"/>	
name in which account is held	<input type="text"/>	
account number	<input type="text"/>	sort code <input type="text"/> - <input type="text"/> - <input type="text"/>
bank reference or building society roll no (if applicable)	<input type="text"/>	

Please be careful when providing your bank details. If you enter the wrong details any payments you make may be delayed.

Please be careful when providing your bank details. If you enter the wrong details any payments you make might be delayed, or credited to the wrong account, and may result in a financial loss.

4 Deceased's details

[illegible]

Please complete the next page ►

5 Details of the deceased's ISA(s)

If your spouse or civil partner had more than one ISA, please list all those from which you want to use your inherited allowance with NS&I.

If there are more than four different ISAs, please provide the details for each of the others on a separate sheet of paper.

name of ISA provider	<input type="text"/>
provider's address if not NS&I	<input type="text"/>
	<input type="text"/>
ISA account number	<input type="text"/>
name of ISA provider	<input type="text"/>
provider's address if not NS&I	<input type="text"/>
	<input type="text"/>
ISA account number	<input type="text"/>
name of ISA provider	<input type="text"/>
provider's address if not NS&I	<input type="text"/>
	<input type="text"/>
ISA account number	<input type="text"/>
name of ISA provider	<input type="text"/>
provider's address if not NS&I	<input type="text"/>
	<input type="text"/>
ISA account number	<input type="text"/>

6 Your signature

Declaration

I confirm that:

- I am the surviving spouse or 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;
- Any subscriptions I make will be under the provisions of regulation 5DDA of the ISA regulations;
- I will make any subscriptions within three years of the date of death, or if later, 180 days of the completion of the administration of the estate.

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

date (DD MM YYYY)

signature

Your marketing preferences

We may contact you occasionally to promote other NS&I accounts and investments that you might be interested in. If you don't want us to do this, mark the box(es) below:

by post ☐ by phone ☐ by email ☐ online ☐

If you mark the 'online' box, you may still see promotional messages when logged in to our website, but they won't be tailored to you.

You can change your marketing preferences at any time online or by contacting us.

7 What to do next

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

Enclose your original certificate of marriage or civil partnership, or a certified copy - see below.

Sending certified copies

If you are sending a copy of your certificate of marriage or civil partnership, it must be certified as being a true copy of the original.

Choose one of the following people to certify the copy of your document: a qualified individual who is currently practising in the legal, financial or teaching profession; a doctor or dentist; a minister of a recognised religion; a civil servant or a prison, police or customs officer.

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

Ask your chosen certifier to write on the copied document:

"I certify that this is a true copy of the original (type of document) belonging to (name)."

Then ask them to sign and date the copied document, clearly print their full name, indicate their occupation or the capacity in which they are providing the certification (eg lawyer, doctor or teacher), provide their work address and daytime telephone number and affix any relevant official stamp where available. Members of professions should also give their institute membership number, if possible.