

Application to switch to a Direct Saver



It's easier and faster to switch your account online, simply scan this QR code or go to nsandi.com/DSAS

**NS
&I**

➤ Please only use this form if you want to switch to an NS&I Direct Saver from another NS&I account.

➤ 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.

➤ **Want to open a Direct Saver not using money from another NS&I account?**

Apply online at nsandi.com

➤ You can only manage our Direct Saver 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 How much do you want to invest?

£ p minimum £1, maximum £2 million per person

2 Switching from another NS&I account

The NS&I account you switch from must be in your name or the name of the second investor, if applicable. If you switch from a fixed term investment that's not on sale, you won't be able to switch back. Any amount you take out from a Direct ISA may not be able to be paid back in during this tax year.

type of NS&I account switching from

account number or holder's number

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 4.

3a Your details

Please complete in full

NS&I number

If you have 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

phone number

Preferably a mobile so we can reach you more easily.

email

If you're resident for tax purposes in any country or territory outside the UK, please complete the fields below.

If you are resident for tax purposes in more than one country or territory outside the UK, please give the tax country and tax identification number for each of the others on a separate sheet of paper.

city of birth

country of birth

tax country

tax identification number

Please complete the next page ►

*Only complete if you
are applying for a joint
investment*

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

date of birth

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(DD MM YYYY)

[illegible][illegible]

nationality	
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[illegible]

If the second investor is resident for tax purposes in any country or territory outside the UK, please complete the fields below.

[illegible][illegible]

We need these details before we can accept your application.

[illegible][illegible]

account number

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 sort code

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bank reference
or building
society roll no
(if applicable)

Please be careful when providing your bank details. If you enter the

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.

*For joint investments
both you and the second
investor must sign.*

Declaration

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

first investor

date (DD MM YYYY)

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second investor
(if applicable)

date (DD MM YYYY)

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