Application to switch to a Guaranteed Income Bond

NS&I

- Please only use this form if you want to switch to an NS&I Guaranteed Income Bond 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.

- **Not switching from another NS&I account?**

  Apply online at **nsandi.com**

- Please make sure you've read our brochure, which includes the customer agreement (terms and conditions last updated 1 February 2023), before switching to this account.

1 How much do you want to invest?

£ ☐☐☐☐☐☐☐ ☐☐ p minimum £500, maximum £1m per person per Issue of a term

term ☐ year(s) Check the summary box to see which terms are currently on general sale.

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

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 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 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 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.

We need your date of birth as you must be at least 16 to invest in an NS&I Guaranteed Income Bond.

We will send any correspondence to the address you give here.

NS&I number **NS&I** ☐☐☐☐☐☐☐☐☐☐☐ If you have an NS&I number, please write it here.

title ☐☐☐☐☐☐☐☐ date of birth (DD MM YYYY) **this is essential** ☐☐ ☐☐ ☐☐☐☐

surname ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

forenames in full ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

address ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

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☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

postcode ☐☐☐☐☐☐☐☐ country ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

nationality ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

phone number ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐ Preferably a mobile so we can reach you more easily.

email

If you're 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.

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

city of birth ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

country of birth ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

tax country ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

tax identification number ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Please complete the next page ▶

3b Second investor's details

Only complete if you are applying for a joint account.

Please complete in full.

The second investor must be at least 16.

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

title

date of birth (DD MM YYYY) **this is essential**

surname

forenames in full

address

postcode

country

nationality

phone number Preferably a mobile so we can reach you more easily.

If the second investor is 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.

If they are resident for tax purposes in any country or territory outside the UK, please complete the fields below.

city of birth

country of birth

tax country

tax identification number

4 Your bank or building society account details

We need these details before we can accept your application.

All income and any withdrawals at maturity will be paid directly into this account.

It must be a personal account held in the UK, which is able to receive payments by electronic transfer (BACS).

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

name in which account is held

account number

sort code – –

bank reference or building society roll no (if applicable)

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.

5 Your signature(s)

For joint investments **both** *investors must sign.*

Declaration:
I/We have had the opportunity to read the customer agreement (terms and conditions) dated **1 February 2023**.

first investor date

second investor (if applicable) date

6 What to do next

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