

Investment Account application

➤ Please complete this form if you're over 16 and want to open an NS&I Investment Account in your own name or jointly with one other person aged over 16.

➤ Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process your form faster.

➤ **Want to open an Investment Account on behalf of a child under 16?**

You'll need to use a different application form. You can download it from nsandi.com/forms or call us and we'll send you one.

➤ **Already have an Investment Account?**

If you want to deposit more money into your Investment Account, please use the simpler Investment Account deposit form. You can download it from nsandi.com/forms or call us and we'll send you one.

1 Your initial deposit

£ p minimum £20, maximum £1 million per person

application
reference number

You can pay it by cheque or by switching from another NS&I account (see section 2). If paying by cheque, write the application reference number on the back.

2a Paying by cheque

name of
account holder

Give details of the
account on which your
cheque is drawn.
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 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.

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 Your details

Please complete 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.

email

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.

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 ►

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Second investor's details

Only complete if you are applying for a joint account.

Please complete in full.

title

date of birth (DD MM YYYY)

surname

forenames in full

address

postcode

country of residence

nationality

phone number

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 the second investor is 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

5

Nominated bank or building society account details

If you want withdrawals paid directly to your bank or building society account, please give its details here. We recommend this for speed and security.

bank/building society

name in which account is held

account number

sort code

bank reference or building society roll no (if applicable)

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.

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.

6

If there is a second investor, who should sign for withdrawals?

both of us together

either of us individually

7

Your signature(s)

For joint accounts 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)

second investor (if applicable)

date (DD MM YYYY)

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:

first investor

by post

by phone

by email

online

second investor (if applicable)

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.

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What to do next

Remember to sign and date your form, then send it to:

NS&I, Sunderland SR43 2SB

If paying by cheque make it payable to 'NS&I'.

NS&I 761A (2024/01) R