



Stocks and Shares Individual Savings Account Application form

Personal Details (please complete in full)

Title (Mr, Mrs, Ms, etc)

First name

Middle name(s)

Surname

Current residential
address including
postcode

Date of birth

(DD/MM/YYYY)

National insurance number

(AB123456C)

I apply to subscribe to a stocks and shares ISA for the tax year: 20 / 20 and each subsequent year until further notice.

ISA Income

Reinvest

Transfer to Taxed portfolio

Applicant Declaration

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 and will not subscribe more than the overall subscription limit in total to a cash ISA, a stocks and shares ISA, an innovative finance ISA and a lifetime ISA in the same tax year;
- I have not subscribed and will not subscribe to another stocks and shares ISA in the same tax year that I subscribe to this stocks and shares ISA, 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 Psigma Investment Management 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 Psigma Investment Management:

- to hold my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; and
- to make on my behalf any claims to relief from tax in respect of ISA investments.

I agree to the ISA terms and conditions which can be found at www.psigma.com.

I declare that this application form has been completed to the best of my knowledge and belief.

Signature

Date

client.services@psigma.com
businessdevelopment@psigma.com
www.psigma.com

 [@PsigmaIM](https://twitter.com/PsigmaIM)

 [company/psigma-investment-management](https://www.linkedin.com/company/psigma-investment-management)



www.psigma.com

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(L5_ISAAF_1019-1119_2.1FINAL)

Application Form for the Psigma Individual Savings Account (ISA)