

ISA Declaration Form



For a Stocks and Shares ISA provided by Seven Investment Management (7IM)

PLEASE PRINT CLEARLY IN BLOCK CAPITALS AND COMPLETE ALL APPLICABLE SECTIONS OF THIS FORM.

Section 01 Individual details

If you have an existing 7IM account, please provide your account number:

Title: First Name(s):

Surname:

Date of Birth: / / NI number:

Section 02 Your options

I apply to subscribe for a stocks and shares ISA for tax year:

/

and each successive year until further notice.

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;
- 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 7IM 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; and
- I agree to the ISA terms and conditions.

I authorise 7IM

- 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.

By signing this form, you declare that this application form has been completed to the best of your knowledge and belief.

Your signature is required for the completion of this form

Signature:

Signed by (please PRINT name):

Date:

Authority to sign¹:

¹If the person signing this form is not the named applicant, please indicate the capacity in which you are signing this form, e.g. as attorney or Court appointed deputy. If signing as an attorney or Court appointed deputy, please also ensure that you have provided us with a certified copy or original of the power of attorney or Court order.

PLEASE RETURN ALL PAGES OF THIS FORM TO SEVEN INVESTMENT MANAGEMENT LLP, 1 ANGEL COURT, LONDON EC2R 7HJ

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