Octopus AIM Inheritance Tax ISA

Additional Permitted Subscriptions authority form

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A brighter way

How to complete this form

This form is to request confirmation of the Additional Permitted Subscription (APS) allowance from another ISA manager. Please complete all sections as directed. Once completed, you can email this to us at investorsupport@octopusinvestments.com, or post to: **Octopus Investments Limited**, **PO Box 10847**, **Chelmsford CM99 2BU**.

Section 1 – About the investor

Title **First name(s)** **Last name**

Date of birth (dd mm yyyy) **National Insurance number**

Existing APS ISA portfolio number Please complete if you already have an APS portfolio with us.

Primary address

Country **Postcode**

Section 2 – Details of the deceased

Deceased's full name

Deceased's date of birth (dd mm yyyy) **Deceased's National Insurance number**

Permanent residential address of the deceased at their date of death

Country **Postcode**

Date of death (dd mm yyyy) **Date of marriage or civil partnership between the investor and the deceased** (dd mm yyyy)

Section 3 – APS allowance transfer information

Name of deceased's ISA manager

Address of deceased's ISA manager

Country

Postcode

Deceased's external ISA account number(s)

Please note if multiple ISAs were held by the deceased with the ISA manager, their value will be combined to form one APS allowance.

Section 4 – Investor declaration

By signing this form, I HEREBY DECLARE THAT I:

- I am the surviving spouse/civil partner of the deceased.
- I was living with the deceased within the meaning of Section 1011 of the Income Tax Act 2007 at the date of the deceased's death (we were not separated under a court order, under a deed of separation, or in circumstances where the marriage or civil partnership had broken down).
- I have not subscribed to and will not subscribe to the APS allowance with the existing ISA provider of the deceased in respect of the deceased named on this application.
- I intend to make an APS application to Octopus Investments.
- I authorise the existing ISA provider of the deceased as specified above to provide Octopus Investments with any information, written or non-written, concerning the APS allowance and former ISA in respect of myself (the investor) and the deceased and to accept any instruction from them relating to the APS allowance being transferred.
- I declare that this APS transfer application form has been completed to the best of my knowledge and belief.

Investor/Attorney signature

Print name

Date signed (dd mm yyyy)

Section 5 – Transfer acceptance

Octopus use only

We (Octopus Investments) are willing to accept this APS allowance transfer in line with the investor's instructions above. We confirm that, subject to relevant checks, we are willing to accept an APS application from the investor.

What happens next?

1. We'll send this authority form to the deceased's ISA manager(s) to request confirmation of the APS allowance.
2. Once this is confirmed, we'll send you an application form which you'll need to return with the funds for your investment.

We have a range of ways to help make our communications accessible. If you'd like to know more, please get in touch.

0800 316 2295
investorsupport@octopusinvestments.com
octopusinvestments.com

Send completed form to:
Octopus Investments
PO Box 10847
Chelmsford CM99 2BU

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