

Cash ISA Application Cina 2024/25

From 6 April 2024 the ISA subscription limit will be
£20,000 for anyone eligible to invest in an ISA

Account number	
Date	

Declaration – Please note that you should read this form carefully, customers are responsible for ensuring the accuracy of personal details recorded within this application form.

I declare that

1. All subscriptions made, and to be made, belong to me;
2. I am 18 years of age or over;
3. I have not subscribed, and will not subscribe, to more than the overall ISA subscription limit total in the same tax year.
4. 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 the 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 Principality 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.
5. I agree to the ISA terms and conditions.

I authorise Principality Building Society

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

Full name	
Address	
Postcode (Please note we cannot accept PO box or 'care of' addresses)	
Date of birth	
Home phone number	
Work phone number	
Mobile phone number	
Email	
Nationality	
Occupation	
Do you have a National Insurance number?	Yes <input type="checkbox"/> No <input type="checkbox"/>
National Insurance (NI) number	



Where home matters
[principality.co.uk](https://www.principality.co.uk)

I apply to subscribe to this Cash ISA for the tax year 2024/25 and each subsequent year until further notice.

I agree to the ISA terms and conditions.

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

I understand that my investment in this ISA is made subject to the (1) Account Terms for this ISA, (2) Savings Terms and Conditions (3) any other applicable Account Brochures. I further understand that for my benefit and protection I should read these documents carefully before signing this declaration and that if I do not understand anything in them I should ask for further clarification.

Data protection

Information supplied will be held in accordance with our privacy policy. This can be found at principality.co.uk/privacy-policy

Future marketing to you

From time to time we may provide you with information regarding existing or new similar products and services offered by us (including but not limited to mortgage lending, savings, general insurance and financial services) our associated companies or our insurance and financial services partners. If you would like to receive this information, you can choose how by ticking the boxes below:

Mail Email Telephone SMS

Member Rewards

When appropriate, we'd also like to contact you with information and special offers about how to sign up for our exclusive loyalty programme, Member Rewards. This may include information on third party promotions and discounts.

If you're also happy for us to contact you about Member Rewards, please tick here:

You will only receive this information by your preferred contact method(s) detailed above, providing you have ticked at least one of them. If you don't tick one of them, you will not receive this information.

You can opt out of receiving direct marketing by calling us on 0330 333 4435 or by using the 'unsubscribe' link in our emails.

Welsh

Where offered I would like to receive all future correspondence in Welsh: Yes

Signed

Date

For internal use only

IMPORTANT: It can take up to 15 business days to process your transfer from the date we receive your form. For Stocks and Shares ISA transfers it can take 26 business days. If your transfer is not completed within 15 business days, please **contact us**.



CALL US
0330 333 4000*



ONLINE
principality.co.uk



BRANCH
Pop in to see us



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*To help us maintain our service and security standards, telephone calls may be monitored and recorded.

Principality Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, reference number 155998. Principality Building Society, Principality House, The Friary, Cardiff, CF10 3FA. principality.co.uk