

# Additional Permitted Subscription (APS) Application & Transfer to Principality

This form should be used for an APS transfer of a deceased customer's ISA from another provider to Principality.

Investor Details	
Full name	
Permanent residential address	
Date of birth	
National insurance number or confirmation that the investor does not have one	
Details of the Deceased	
Full name	
Address at time of death	
Date of Birth	
Date of death	
National insurance number (if known)	
Date of Marriage/Civil Partnership	
Existing ISA account number(s)	
Please note if multiple ISAs were held by the deceased with the ISA provider their value will be combined to form one APS allowance.	
APS Allowance Transfer Information	
Name of deceased ISA provider	
Address of deceased ISA provider	

Please be aware that an APS allowance can only be transferred once and only where no subscriptions have been made under that APS allowance. Once transferred subscriptions may only be made in cash.

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## APS Eligibility Declaration

### I (the investor) declare that:

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 additional permitted subscription allowance with the existing ISA provider of the deceased in respect of the deceased named on this application.

I intend to make an additional permitted subscription application to Principality Building Society.

I authorise the existing ISA provider of the deceased as specified above to provide Principality Building Society with any information, written or non-written, concerning the APS allowance and former ISA in respect of the 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.

Signed \_\_\_\_\_ Date \_\_\_\_\_

## Transfer Acceptance

We, Principality Building Society, are willing to accept this APS allowance transfer in line with the investors instructions above. We confirm that, subject to relevant checks, we are willing to accept an additional permitted subscription application from the investor.