

Please remember that if multiple ISAs were held by the deceased their value will be combined to form one APS allowance.

Deceased customer's ISA account(s):

Sort code

Account number

Sort code

Account number

This section must be completed to confirm the customer named on this application is eligible to make an additional permitted subscription to an ISA in respect of the deceased named on this application.

I (the investor) declare that:

- I am currently resident in the UK;
- I was married to or in a civil partnership with the deceased at their date of death and have evidence to support this declaration that can be produced on request;
- 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 am aged 16 years of age or over.
- the subscription is made under the provisions of regulation 5DDA of the ISA regulations;
- the subscription is being made within 3 years of the date of death, or if later, 180 days of the completion of the administration of the estate;
- all subscriptions made, and to be made, belong to me.

Please be aware that once you have made additional permitted subscriptions to your TSB Cash ISA any further additional permitted subscriptions up to the limit of your APS allowance MUST be made to TSB and be accompanied by an APS Subscription Eligibility Declaration.

I authorise TSB to hold my cash subscriptions and any interest earned on those subscriptions.

I agree to the ISA terms and conditions.

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

Your signature

Date

For bank use only

Branch sort code

Branch contact name

Branch stamp

Date

Staff checklist

Please ensure that the customer is given:

TSB Cash ISA Terms and Conditions (TSB12070)



If you'd like this in another format such as large print, Braille or audio please ask in branch.

Calls may be monitored or recorded.

Tax treatment depends on your individual circumstances and may change.

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