Fixed Rate Cash ISA

Provided by OneFamily

Application Form - 2024/25 tax year

You can deposit up to £20,000 this tax year into a cash ISA (subject to your combined overall ISA allowance), or transfer in ISAs held with other providers (minimum £500). Please complete this form in BLOCK CAPITALS using BLACK INK, making sure that ALL boxes inside the RED borders are completed, otherwise your application could be delayed. All amendments must be initialled.

Please print this form, complete and return by post to: Post Office Savings, PO Box 5179, Brighton, BN50 9UY

		Occupation							
f applying under Power of Attor	ney please tick here								
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		If yes, enter it here		a payslip, P45 form or P60, a letter from HM					
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				a letter from DWP.					
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ction 2 - Fixed Rate T	erm (see Summary Box for terms currently ava	ilable)							
oose term (please tick one box)	1 year 2 years	3years							
	m above then we will open an ISA with a 1 year								

Applying with a Power of Attorney? If you are applying with a Power of Attorney, you will need to provide documents, including proof of your identity, with your application. For a list of acceptable documents, please phone 0800 169 7500.



Section 3 - Funding your Fixed Rate Cash ISA Fixed Rate Cash ISA is a single subscription account. One subscription during the current tax year only. You can open a Fixed Rate Cash ISA either with a subscription or a transfer of another ISA you hold. Please select one of the boxes below. If you would like to open an account with a subscription and a transfer or multiple transfers you will need to compete an application form for each method or transfer. For each application we receive we will open a separate account. I would like to transfer an existing ISA (please also make sure you sign and date section 5 and complete section 6). Subscription: I apply to subscribe to a cash ISA for the tax year beginning 6 April 2024 only. I would like to make a subscription now of **f**. paid by: Debit card (only available if applying through a Post Office branch). Cheque (please make the cheque payable to yourself (e.g. Mrs J Smith) and write your address on the back. Please also provide the sort code and account number in the boxes below). Sort code Account number Payment from my Post Office easy access Savings account Post Office account number (you'll also need to provide us with the details of your account in the boxes provided). To help us meet anti-money laundering requirements, please detail the source of your subscription above e.g. salary, savings, sale of property, gift etc. Section 4 - Nominated Account

Section 4 – Nominated Account

Your interest will automatically be added to your ISA. If you would like this to be paid into a nominated account instead, please provide your account details below. Your nominated account can also be used if you'd like to make a withdrawal after your fixed term has ended.

Account holder's name (e.g. John Smith)

Sort code — — Account Number

Interest Payments: By default, all interest due will be paid into your ISA annually. If you wish to have this interest paid into your Nominated Account instead, please tick here



This ISA will be managed under the terms outlined in the Key Features and the Terms and Conditions. Before signing your application, you should read these terms carefully and contact us if there is anything you do not understand.

I authorise Family Equity Plan Limited:

- to hold my cash subscriptions, and any interest earned on those subscriptions;
- to make on my behalf any claims to relief from tax in respect of ISA investments.

If I am subscribing to this ISA:

I apply to subscribe to a cash ISA for the tax year beginning 6 April 2024. And 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, to more than the overall ISA subscription limit total in the same tax year:
- 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 Family Equity Plan Limited if I cease to be so resident or to perform such duties or be married to, or in a registered civil partnership with, a person who performs such duties;
- 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 and I confirm that I have received the Deposit Information Sheet.

Signature X

D D M M Y Y Y

Date

Data Protection: Family Equity Plan Limited will hold your personal data in line with our Privacy Notice. The full version is here www.onefamily.com/privacy. It explains your rights as data subject and how we use your data.

A copy is also available by writing to OneFamily, 16-17 West Street, Brighton, BN1 2RL; by calling Customer Services on 0345 602 3409 or, by email to customerservices@onefamily.com.

Full details about how your information will be used by Post Office Limited (Post Office) and Bank of Ireland (UK) plc (Bank of Ireland) can be found in the Post Office Privacy Policy and Bank of Ireland Privacy Notice. You will find the summarised Post Office Privacy Policy at the back of the enclosed Key Information Pack. Bank of Ireland's Privacy Notice can be found at https://www.bankofirelanduk.com/po-notice and a copy will also be provided in your Welcome Pack.

Anti-money laundering: Family Equity Plan Limited may need to verify the name and address of the applicant to comply with anti-money laundering legislation. We may use credit reference agencies to help us do this and by signing the application form you are agreeing to these checks taking place.

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Transfer	details																		
What wou	uld you like to transfer (tick	all the	e boxe	es bel	ow tha	at appl	y):												
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