

# 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

### Section 1 – Personal details

If applying under Power of Attorney please tick here

Title (Mr, Mrs, Miss, etc.)

Date of birth

First name

Middle name(s)/Initial(s) (if applicable)

Last name

House/flat number and/or house name

Street

Town

County

Postcode

Home phone number

Mobile phone number

Email address

Occupation

Your country of birth

Your nationality

Do you have a National Insurance (NI) number?

Yes  No

If yes, enter it here

You should be able to find your NI number on a payslip, P45 form or P60, a letter from HM Revenue & Customs, or a letter from DWP.

**Keep in touch so you don't miss out.** We wouldn't want you to miss out on offers, exclusive deals and the latest information on products and services that are available to you from across Post Office Limited and its subsidiaries. Our partner, Bank of Ireland (UK) plc would also like your consent to tell you about similar financial products and associated services provided through our partnership, for example, offers of new rates or additional credit where relevant.

Our Privacy Policies inform you about how we use your personal details for marketing and what to do if you change your mind. Please read our Privacy Policies which can be found at [postoffice.co.uk/privacy](https://postoffice.co.uk/privacy) and [www.bankofirelanduk.com/po-notice](https://www.bankofirelanduk.com/po-notice).

**Please tick the boxes below to indicate how you'd prefer to receive these offers and we'll do the rest.**

Post  Phone  Email  Text

Please note that if you have any other Post Office or Post Office/Bank of Ireland UK plc products and have provided a different preference to those provided above, please allow for a short period of time for your latest preference(s) to apply. Information they can provide and the services they can offer me. For Power of Attorney applications, marketing preferences will apply to the Donor only.

### Office Use Only

Campaign code:

Transfer 10092

Deposit 10087

Receipt number

Branch code/FAD code

### Section 2 - Fixed Rate Term (see Summary Box for terms currently available)

Choose term (please tick one box)

1 year

2 years

3 years

If you do not select a Fixed rate term above then we will open an ISA with a 1 year fixed rate term for you.

**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.

POST  
OFFICE



## Section 6 - Authority to transfer into a Fixed Rate Cash ISA

This section will be sent to your existing ISA Manager as evidence of your wish to transfer.

### Information about you

Title (Mr, Mrs, Miss, etc.)	<input type="text"/>	Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
First name	<input type="text"/>												
Last name	<input type="text"/>												
House/flat number/house name	<input type="text"/>												
Street	<input type="text"/>												
Town and county	<input type="text"/>												
Postcode	<input type="text"/>												
Home phone number	<input type="text"/>												
National Insurance number (if you have one)	<input type="text"/>			<input type="text"/>			<input type="text"/>			<input type="text"/>			

### Information about the ISA to be transferred

What type of ISA are you transferring?	Cash <input type="checkbox"/>	Stocks and shares <input type="checkbox"/>
Name of existing ISA provider	<input type="text"/>	
Account number	<input type="text"/>	
Sort Code (if applicable)	<input type="text"/> — <input type="text"/> — <input type="text"/>	
Roll number (if applicable)	<input type="text"/>	
Have you paid money into your ISA in the current tax year (e.g. on or after 6 April 2024)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

### Transfer details

What would you like to transfer (tick all the boxes below that apply):

- The total value of my ISA (if you choose to transfer the total value of your ISA, it will close).
- All my current tax year subscriptions (you'll need to transfer these in full, including any interest or growth on those subscriptions).
- All my previous tax years' subscriptions (including the interest or growth on those subscriptions).
- A partial amount of £  ,  .  from my previous tax years' subscriptions.

What's the estimated value of your transfer? £  ,  .

Do you have a notice or maturity period on your existing ISA? Yes  No

If you do, would you like your existing ISA provider to (please tick one of the following boxes):

- Wait for the full notice or maturity period to end before going ahead with this transfer.
- Go ahead immediately with this transfer; I accept any loss of interest or charges as a result of this.

### Transfer authority

- I authorise my existing ISA provider as specified above, to transfer this ISA to Family Equity Plan Ltd.
- I authorise my existing ISA provider to provide Family Equity Plan Ltd with any information, written or non-written, concerning this ISA and to accept any instructions from them relating to this ISA transfer.

Signature

Date