

## APPENDIX 1 - APPLICATION FORM (ISA)

Please complete a separate form for each applicant

Full Name:

Permanent Residential Address:

Postcode:

Date of Birth:

National Insurance (NI) Number:

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

Please tick at least one of the following

I wish to apply for an RCBIM stocks & shares ISA for the tax year 20\_\_\_/\_\_\_ and each subsequent year until further notice.

I wish to apply for an RCBIM stocks & shares ISA for the tax year 20\_\_\_/\_\_\_ only.

I would like to open an RCBIM stocks & shares ISA to complete an ISA transfer, no further subscriptions. (Now please complete Appendix 2)

### 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 more than the overall subscription limit in total to a cash ISA, a stocks and shares ISA, and an innovative finance ISA, in the same tax year;

I have not subscribed and will not subscribe to another stocks and shares ISA in the same Tax year that I subscribe to this stocks and shares ISA; and

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 R.C. Brown Investment Management PLC (RCBIM) if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or a civil partnership with, a person who performs such duties.

Signed:

Date:

### Head Office:

1 The Square, Temple Quay, Bristol BS1 6DG

tel: 0117 925 6073

email: [enquiries@rcbim.co.uk](mailto:enquiries@rcbim.co.uk) [www.rcbim.co.uk](http://www.rcbim.co.uk)