

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.

I wish to apply for an RC Brown Investment Management (RCBIM) Stocks & Shares ISA: (please tick at least one of the following)

- To complete an ISA transfer (now please complete Appendix 2)
- For the tax year 20____ / ____ for an amount of £_____
- and for every subsequent year, for the full ISA allowance (subject to available funds)
- and for specific subsequent years (I will notify you which years and the amount for each year)

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 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 RC Brown Investment Management 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.

I authorise RC Brown Investment Management to hold in a RCBIM ISA my cash subscription, ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash; to make on my behalf any claims to relief from tax in respect of ISA investments; I agree to the ISA terms and conditions. I declare that the information given is correct to the best of my knowledge and belief.

Signed:	Date:
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All correspondence to Head Office

Head Office:
1 The Square, Temple Quay, Bristol BS1 6DG

tel: 0117 925 6073 **email:** enquiries@rcbim.co.uk **www.rcbim.co.uk**