

To request the value of a deceased account holder's ISA, for the purpose of utilising a spousal APS Allowance, please complete and return this form. If you have any questions about this form please contact our Customer Experience Centre on 0345 0700 720.

Please complete all fields in this form (where applicable).

Section A Requestor (Spouse) Details	
Requestor Title	Mr <input checked="" type="checkbox"/> Mrs <input checked="" type="checkbox"/> Miss <input checked="" type="checkbox"/> Ms <input checked="" type="checkbox"/> Other <input type="text"/>
Requestor Full Name(s)	<input type="text"/>
Requestor Date of Birth	<input type="text" value="DDMMYYYY"/>
Requestor National Insurance Number	<input type="text"/>
Do you have an existing Selftrade Shares ISA?	Yes <input type="checkbox"/> No <input type="checkbox"/> If so, what is the Account Number? <input type="text"/>

Section B Details of the Deceased	
Deceased Full Name(s)	<input type="text"/>
Permanent Residential Address of the deceased at their date of death	<input type="text"/>
Deceased Date of Birth	<input type="text" value="DDMMYYYY"/>
Deceased National Insurance Number (if known):	<input type="text"/>
Date of Death	<input type="text" value="DDMMYYYY"/>
Deceased ISA Number(s)	<input type="text"/>

Section C APS Eligibility Declaration	
I declare that:	
<ul style="list-style-type: none">I am the surviving spouse / civil partner of the deceasedI 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 hereby declare that this APS allowance request has been completed to the best of my knowledge and belief.	
Signed	<input type="text"/>
Date	<input type="text" value="DDMMYYYY"/>

Next Steps
Please return this form to: Selftrade PO Box 4923 Worthing BN99 6SF
Once approved, you can make subscriptions to the APS Allowance, in your Selftrade Shares ISA, by completing and returning an Additional Permitted Subscription Form .