Easy Access Cash ISA Deposit and/or Transfer Application Form

Provided by OneFamily

2025/26 tax year

Deposit up to £20,000 this tax year (subject to your combined overall ISA allowance), and/or transfer in ISAs held with other providers (minimum £100).

Debit card subscriptions only available if applying in a Post Office branch. 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 detail	s	
		Occupation
Title (Mr, Mrs, Miss, etc.)	Date of birth	Your country of birth
	D D M M Y Y Y	
First name		Your nationality
Middle name(s)/Initial(s) (if applicable)		
		You must provide a National Insurance (NI) number unless you do not qualify for one. Are you eligible for a NI number? Yes No your NI number on a
Last name		If yes, enter it here payslip, P45 form or P60, a letter from HM Revenue
		& Customs, or a letter from DWP.
House/flat number and/or house name		
		Keep in touch so you don't miss out. We wouldn't want you to miss out on offers, exclusive deals and
Church		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
Street		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
Town		you change your mind. Please read our Privacy Polices which can be found at postoffice.co.uk/privacy and 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.
County		Post Phone Email Text Please note that if you have any other Post Office or Post Office/Bank of Ireland UK pic 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
Postcode		applications, marketing preferences will apply to the Donor only.
		Campaign code:
		Branch code/FAD code
Home phone number		Receipt number
Mobile phone number		
Email address		
		Il need to provide documents, including proof of your identity, with your application.
For a list of acceptable documents	please phone 0800 169 /500.	

If applying under Power of Attorney please tick here



Section 2 – Funding your Easy Access Cash ISA You can open your Easy Access Cash ISA with a subscription and/or a transfer. Please tick the boxes below that apply and make sure you complete the relevant sections of the application form (this will help avoid any delays to us accepting your application). To apply by Debit Card visit your nearest branch.											
Transfer:											
I would like to transfer an existing ISA (please also make sure you sign and date section 4 and complete section 5).											
Subscription: I apply to subscribe to a cash ISA for the tax year beginning 6 April 2025 and each subsequent year until further notice.											
I would like to make a subscription now of £ , paid by:											
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 (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 3 – Withdrawals

If you'd like to be able to make withdrawals to a UK personal bank or building society current account, please provide your account details below and we'll set up a Nominated Account for you. You must be named on the account you nominate.

Account holder's name (e.g. John Smith)																			
Sort code		-		_				Acc	count Num	nber									
Interest	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.																		

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

Section 4 – Declaration and your signature

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, or intend to subscribe, to this ISA:

I apply to subscribe to a cash ISA for the tax year beginning 6 April 2025 and each subsequent year until further notice.

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.





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.

Section 5 – Authority to transfer into an Easy Access 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.)					۵	Date of	birth	D	D	М	М	Y	Y	Y	Y	
First name																	
Last name																	
House/flat nun	nber/house name																
Street																	
Town and cou	nty																
Postcode																	
Home phone n	umber																
National Insurance number (if you have one)																	
Information	about the ISA to b	e transfer	red														
What type of	f ISA are you transfer	rring? Cas	sh	St	ocks a	nd sha	ares										
Name of existi	ng ISA provider																
Account numb	ber																
Sort Code (if a	pplicable)			-		-											
Roll number (if	applicable)																
Have you pai	d money into your IS	A in the cur	rent tax	k year (e.	.g. on o	r afte	r 6 Apı	il 2025)?		١	ſes		No			
Transfer det	ails																
What would	you like to transfer (tick all the b	boxes t	hat appl	y):												
1. T	he total value of my l	ISA (if you	choose	to trans	fer the	total	value	of your	ISA, it	will cl	ose)						
	ll my current tax yea												-	vth or	n thos	e subs	scriptions)
	II my previous tax ye		riptions	(includi	ng the	intere	est or g	rowth									
4 . A	partial amount of f	2		,		e l			from r	ny pre	evious	s tax y	years	subs	criptio	ons	
What's the e	stimated value of yo	ur transfer?	? £			,			-								
Do you have	a notice or maturity	period on y	/our exi	sting IS	۹?		Yes			No							
lf you do, wo	uld you like your exis	ting ISA pr	rovider	to (plea:	se tick (one of	f the fo	ollowing	g boxes	5):							
Wait f	or the full notice or m	naturity per	riod to e	end befo	re goir	ng ahe	ead wit	th this t	ransfe	r.							
Go ah	ead immediately with	n this trans [.]	fer; l ac	cept any	/ loss o	f inter	rest or	charge	s as a i	esult	of this	5.					
Transfer aut	hority																
• I authoris	e my existing ISA pr	ovider as s	specifie	d above	e, to tra	ansfer	this I	SA to F	amily	Equity	/ Plan	Ltd.					
	e my existing ISA pr o accept any instruc	-		-				-	inform	ation	, writ	ten o	or non	-writ	ten, c	oncer	ning this
Ciercela						Det											
Signature	X					Date											