# Fixed Rate Cash ISA

## Provided by OneFamily

Application Form – 2025/26 tax year

You can deposit up to £20,000 this tax year (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 det	ails	
		Occupation
Title (Mr, Mrs, Miss, etc.)	Date of birth	
	DDMMYYYY	Your country of birth
First name		Your nationality
Middle name(s)/Initial(s) (if applicat	ble)	You must provide a National Insurance (NI)
		number unless you do not qualify for one. Yes No Are you eligible for a NI number?
Last name		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.
House/flat number and/or house na	ame	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
Street		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 Polices which can be found at postoffice.co.uk/privacy and www.bankofficelanduk.com/po-notice.
Town		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
County		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.
Postcode		
		Office Use Only
		Campaign code:
		Transfer 10092 Branch code/FAD code
Home phone number		Deposit 10087
		Receipt number
Mobile phone number		
Email address		

Section 2 - Fixed Rate Term (see Summary Box for terms currently available)									
Choose term (please tick one box) 1 year	2 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.

If applying under Power of Attorney please tick here



Section 3 – Funding your Fixed Rate Cash ISA											
Fixed Rate Cash ISA is a single subscription account. One subscription during the current tax year only.											
You can open a Fixed Rate Cash ISA either with a subscription or a transfer of another ISA you hold. Please select one of the boxes below. If you would like to open an account with a subscription and a transfer or multiple transfers you will need to compete an application form for each method or transfer.											
For each application we receive we will open a separate account.											
Transfer:											
I would like to transfer an existing ISA (please also make sure you sign and date section 5 and complete section 6).											
Subscription: I apply to subscribe to a cash ISA for the tax year beginning 6 April 2025 only.											
I would like to make a subscription now of £ paid by:											
<b>Debit card</b> (only available if applying through a Post Office branch).											
<b>Cheque</b> (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 Post Office account number   (you'll also need to provide us with the details of your account in the boxes provided). Post Office account number											
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 4 – Nominated Account

Your interest will automatically be added to your ISA. If you would like this to be paid into a nominated account instead, please provide your account details below. Your nominated account can also be used if you'd like to make a withdrawal after your fixed term has ended.

Account holder	's name (e.g.	lohn Smith)						
Sort code	-	-	Account Number					

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 5 – 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 to this ISA:

I apply to subscribe to a cash ISA for the tax year beginning 6 April 2025. 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.

Signa					
×					
Date					
D	М	М	Y	Y	Y

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 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.)								Da	ite of b	irth	D	D	Μ	Μ	Y	Y	Y	Y
First nar	ne																		
Last name																			
House/flat number/house name																			
Street																			
Town ar	nd county																		
Postcod	e																		
Home p	hone number																		
National Insurance number (if you have one)																			
Information about the ISA to be transferred																			
What ty	pe of ISA are you transferring	g? Cas	sh		Stocks	and s	hares												
Name of	f existing ISA provider																		
Account	number																		
Sort Coo	de (if applicable)			—			—												
Roll num	nber (if applicable)																		
Have yo	u paid money into your ISA in	ו the כו	urrent	tax ye	ear (e.o	g. on o	r after	6 Apr	il 202!	5)? Ye	s	1	٥V						
Transfe	er details																		
	ould you like to transfer (tick																		
1.	The total value of my ISA																		
2.	All my current tax year su										•	·		Ĩ	vth or	i those	subs	criptio	ns).
3.	All my previous tax years	s' subs	criptic	ons (ir	ncludir	ng the	intere	st or g	rowth	on the									
4.	A partial amount of $f$				,						fro	om my	previo	ous ta:	x year	s' subs	scriptio	ons.	
What's	the estimated value of your t	ransfei	r? <b>£</b>				,												
Do you l	have a notice or maturity per	iod on	your	existir	ng ISA	? Y€	es	Ν	10										
lf you do	o, would you like your existing	g ISA p	orovid	ler to	(pleas	e tick (	one of	the fo	ollowin	g boxe	es):								
	Wait for the full notice or ma	iturity	perioc	d to er	nd bef	ore go	ing ah	nead w	/ith thi	s trans	fer.								
	Go ahead immediately with t	this tra	ansfer	; I acc	ept an	ıy loss	of inte	erest o	or char	ges as	a res	sult of	this.						
Transfe	er authority																		
• Laut	thorise my existing ISA p thorise my existing ISA p cerning this ISA and to ac	rovide	er to	prov	ide Fa	mily	Equit	y Pla	n Ltd	with a	any i	nforn	natio	-			ı-wri	tten,	
Signatur	e 🗶					[	Date	D	D	М	М	Y	Y	Y	Y				