

Direct ISA inherited allowance account application for an attorney, receiver or deputy

- Please note that you can only apply for a Direct ISA inherited allowance account if the holder is the surviving spouse or civil partner.
- Before we accept an application, we may make electronic checks on the identity and address of the holder and the attorney, receiver or deputy. We may also ask for documentary evidence.
- **Do not send any money with your initial application.** We can't accept deposits until we have opened the account. Before we open the account, we will contact the manager(s) of the deceased's ISA(s) for further information, including confirmation that none of the inherited allowance has already been used.
- We require the holder to sign in conjunction with the attorney, receiver or deputy, unless there is a physical or mental incapacity. You also need to enclose the original power of attorney or confirmation of your appointment as receiver or deputy, or a certified copy, if you have not already registered one with us that covers you applying for and managing this account.

You also need to send the holder's original certificate of marriage or civil partnership, or a certified copy.

Please see the end of the form for who can certify a copy and how to do so.
- Where an appointed attorney, receiver or deputy has restricted authority or must act jointly for all transactions with another appointed individual, the NS&I Direct ISA inherited allowance account cannot be managed online or by phone. In this case all communications and transactions will be by post only
- Please write in **BLACK CAPITAL LETTERS** inside the boxes. This helps us process the form faster.

1 Account holder's details

Please complete in full.

NS&I number If the holder has an NS&I number, please write it here.

title date of birth (DD MM YYYY)

surname

forenames in full

address

postcode country of residence

nationality

Does the holder have a National Insurance number? yes no
(Please mark one box only)

National Insurance number If yes, you must write the number here.

2 Deceased's details

title date of birth (DD MM YYYY)

surname

forenames in full

address at date of death

postcode date of marriage/civil partnership (DD MM YYYY)

date of death (DD MM YYYY) National Insurance number

Please complete all pages ►

3 Details of the deceased's ISA(s)

If the holder's spouse or civil partner had more than one ISA, please list all those from which you want to use the holder's inherited allowance with NS&I.

name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	
name of ISA provider	
provider's address if not NS&I	
ISA account number	

7 What to do next

- Remember to sign and date your form, then send it to:
NS&I, Sunderland SR43 2SB

Please enclose the holder's original certificate of marriage or civil partnership, or a certified copy. Also enclose the original power of attorney or confirmation of your appointment as receiver or deputy, or a certified copy, unless you have already registered one with us that covers you applying for and managing this account.
See below about sending certified copies.

Thank you

Sending certified copies

If you are sending copies of the certificate of marriage, civil partnership, power of attorney, or a copy of the confirmation of your appointment as receiver or deputy, they must be certified as being a true copy of the original.

Who can certify the copy

If it's a copy of the power of attorney, choose one of the following people to certify it: the donor (if they still have capacity); a solicitor; a notary public or, unless it is a lasting power of attorney, a stockbroker.

If it's a copy of the certificate of marriage, civil partnership or confirmation of your appointment as receiver or deputy choose one of the following people to certify it: a qualified individual who is currently practising in the legal, financial or teaching profession; a doctor or dentist; a minister of a recognised religion; a civil servant or a prison, police or customs officer.

The person you choose to certify the copy must not be related to you by birth or marriage, in a personal relationship with you or live at the same address.

How to certify the copy

Ask your chosen certifier to write on the copied document:

"I certify that this is a true copy of the original (type of document) belonging to (name)."

Then ask them to sign and date the copied document, clearly print their full name, indicate their occupation or the capacity in which they are providing the certification (eg lawyer, doctor or teacher), provide their work address and daytime telephone number and affix any relevant official stamp where available. Members of professions should also give their institute membership number, if possible.