

5 Details of the deceased's ISA(s)

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

If there are more than four different ISAs, please provide the details for each of the others on a separate sheet of paper.

| | |
|--------------------------------|----------------------|
| name of ISA provider | <input type="text"/> |
| provider's address if not NS&I | <input type="text"/> |
| ISA account number | <input type="text"/> |
| name of ISA provider | <input type="text"/> |
| provider's address if not NS&I | <input type="text"/> |
| ISA account number | <input type="text"/> |
| name of ISA provider | <input type="text"/> |
| provider's address if not NS&I | <input type="text"/> |
| ISA account number | <input type="text"/> |
| name of ISA provider | <input type="text"/> |
| provider's address if not NS&I | <input type="text"/> |
| ISA account number | <input type="text"/> |

6 Your signature

Declaration

I confirm that:

- I am the surviving spouse or civil partner of the deceased;
- I 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;
- Any subscriptions I make will be under the provisions of regulation 5DDA of the ISA regulations;
- I will make any subscriptions within three years of the date of death, or if later, 180 days of the completion of the administration of the estate.

I have had the opportunity to read the customer agreement (terms and conditions) dated **1 July 2024**.

signature date (DD MM YYYY)

Your marketing preferences

We may contact you occasionally to promote other NS&I accounts and investments that you might be interested in. If you don't want us to do this, mark the box(es) below:

by post by phone by email online

If you mark the 'online' box, you may still see promotional messages when logged in to our website, but they won't be tailored to you.

You can change your marketing preferences at any time online or by contacting us.

7 What to do next

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

Enclose your original certificate of marriage or civil partnership, or a certified copy - see below.

Sending certified copies

If you are sending a copy of your certificate of marriage or civil partnership, it must be certified as being a true copy of the original.

Choose one of the following people to certify the copy of your document: 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.

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.